Adobe

InDesign CC

2014 release

Shakoor Bukhuth

CLASSROOM IN A BOOK®

The official training workbook from Adobe

Kelly Kordes Anton and John Cruise

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Adobe® InDesign CC Classroom in a Book (2014 Release)

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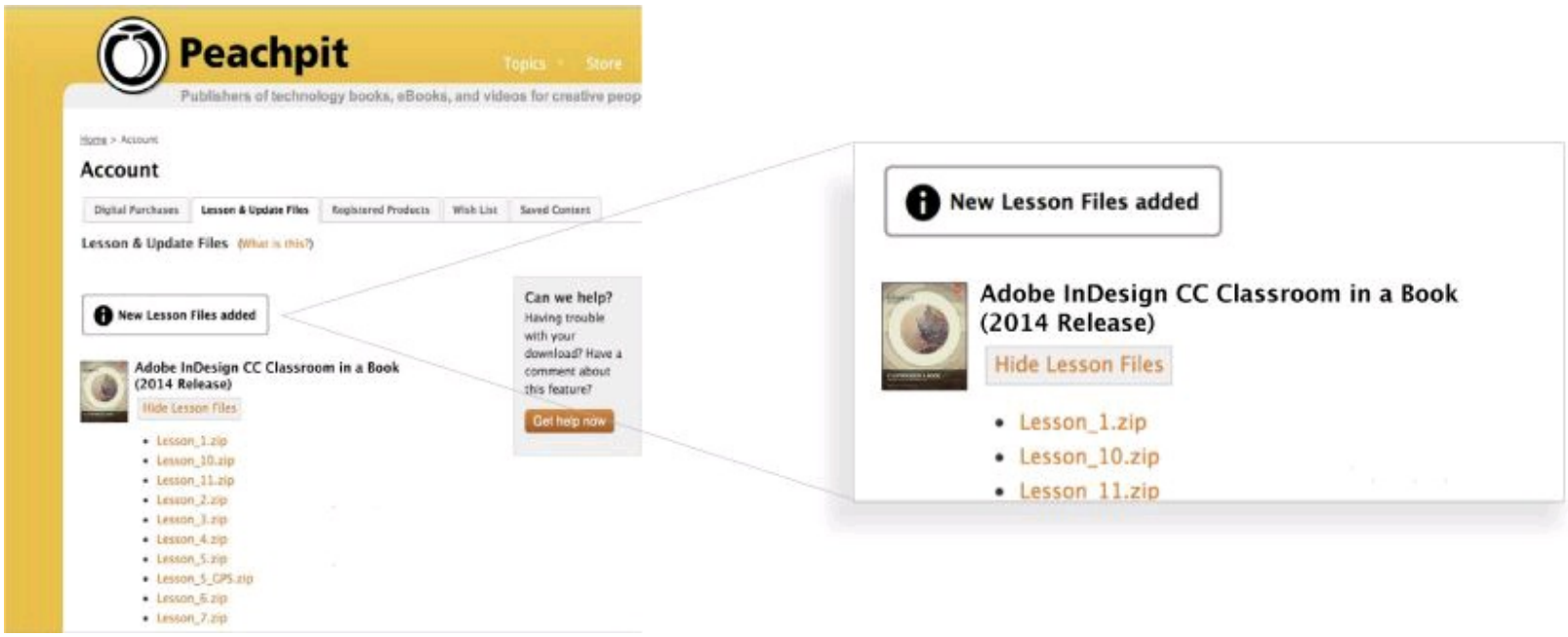
To access these files, follow the steps below:

1. On a Mac or PC, go to **www.peachpit.com/redeem** and enter this code:

575A5C44485D

2. If you do not have a Peachpit.com account, you will be prompted to create one.
3. The downloadable files will be listed under Lesson & Update Files tab on your Account page (see image below).
4. Click the lesson file links to download them to your computer.

If you are unable to locate the files for this title by following the steps above, please email ask@peachpit.com and supply the code from step one. Our customer service representatives will assist you as soon as possible.



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Then, create a Lessons folder inside the InDesignCIB folder and drag each individual Lesson folder to your InDesignCIB/Lessons folder.

You'll import these sample images into your Lightroom library and learn to organize them using the catalog file that is central to many of the projects in this book. Keep the lesson files on your computer until you've completed all the exercises.

To learn how to create the catalog file, go to the section Creating a Lightroom catalog for use with this book in "Getting Started" at the front of the book.

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Contents

GETTING STARTED

- About Classroom in a Book
- Prerequisites
- Installing the software
- Saving and restoring the InDesign Defaults file
- Additional resources
- Adobe Authorized Training Centers
- Checking for updates

1 INTRODUCING THE WORKSPACE

- Getting started
- Looking at the workspace
- Working with panels
- Customizing the workspace
- Navigating through a document
- Using context menus
- Modifying Interface preferences
- Exploring on your own

2 GETTING TO KNOW INDESIGN

- Getting started
- Viewing guides
- Preflighting as you work
- Adding text
- Working with styles
- Working with graphics
- Working with objects
- Working with object styles
- Viewing the document in Presentation mode
- Exploring on your own

3 SETTING UP A DOCUMENT AND WORKING WITH PAGES

- Getting started
- Creating and saving custom document settings
- Creating a new document
- Switching between open InDesign documents

Working with master pages
Applying master pages to document pages
Adding new document pages
Rearranging and deleting document pages
Changing the size of pages
Adding sections to change page numbering
Overriding master page items on document pages and placing text and graphics
Viewing the completed spread
Exploring on your own

4 WORKING WITH OBJECTS

Getting started
Working with layers
Creating and modifying text frames
Creating and modifying graphics frames
Adding metadata captions to graphics frames
Placing and linking graphics frames
Changing the shape of a frame
Wrapping text around a graphic
Modifying the shape of frames
Transforming and aligning objects
Selecting and modifying grouped objects
Creating a QR code
Finishing up
Exploring on your own

5 FLOWING TEXT

Getting started
Flowing text into an existing frame
Flowing text manually
Creating text frames while flowing text
Flowing text automatically
Creating threaded frames automatically
Resizing text frames automatically
Adding a jump line page number
Exploring on your own

6 EDITING TEXT

Getting started
Finding and changing a missing font
Entering and importing text
Finding and changing text and formatting
Checking spelling
Editing text by dragging and dropping
Using the Story Editor
Tracking changes
Exploring on your own

7 WORKING WITH TYPOGRAPHY
Getting started
Adjusting vertical spacing
Changing fonts and type styles
Fine-tuning columns
Changing paragraph alignment
Creating a drop cap
Adjusting letter and word spacing
Adjusting line breaks
Setting tabs
Adding a rule above a paragraph
Exploring on your own

8 WORKING WITH COLOR
Getting started
Managing color
Defining printing requirements
Creating and applying colors
Working with gradients
Creating a tint
Creating a spot color
Using advanced gradient techniques
Exploring on your own

9 WORKING WITH STYLES
Getting started
Creating and applying paragraph styles
Creating and applying character styles

Nesting character styles inside paragraph styles
Creating and applying object styles
Creating and applying table and cell styles
Globally updating styles
Loading styles from another document
Exploring on your own

10 IMPORTING AND MODIFYING GRAPHICS

Getting started
Adding graphics from other programs
Comparing vector and bitmap graphics
Managing links to imported files
Updating revised graphics
Adjusting display quality
Working with clipping paths
Working with alpha channels
Importing native Adobe graphics files
Using a library to manage objects
Using Adobe Bridge to import graphics
Exploring on your own

11 CREATING TABLES

Getting started
Converting text to a table
Changing rows and columns
Formatting a table
Creating a header row
Adding graphics to table cells
Creating and applying table and cell styles
Exploring on your own

12 WORKING WITH TRANSPARENCY

Getting started
Importing and colorizing a grayscale image
Applying transparency settings
Adding transparency effects to imported vector and bitmap graphics
Importing and adjusting Illustrator files that use transparency
Applying transparency settings to text

Working with effects
Exploring on your own

13 PRINTING AND EXPORTING
Getting started
Preflighting files
Packaging files
Creating an Adobe PDF proof
Previewing separations
Previewing how transparency effects will be flattened
Previewing the page
Printing a laser or inkjet proof
Using the Ink Manager
Exploring on your own

14 CREATING ADOBE PDF FILES WITH FORM FIELDS
Getting started
Adding form fields
Exporting an interactive Adobe PDF file
Exploring on your own

15 CREATING AND EXPORTING AN EBOOK
Getting started
Completing the booklet
Choosing the content of an ebook
Adding metadata
Exporting an EPUB file
Exploring on your own

16 CREATING AN IPAD PUBLICATION
Getting started
Creating a new digital publication
Adding interactive elements

INDEX

Getting Started

Welcome to Adobe® InDesign® CC (2014 release), a powerful page-design and production application that offers precision, control, and seamless integration with other Adobe professional graphics software. Using InDesign, you can produce professional-quality, full-color documents and print them using a variety of output devices, including desktop printers, high-resolution imaging devices, and high-volume color printing presses. You can also design publications for a broad range of electronic devices, such as tablets, smart phones, and eReaders, and export InDesign document in several formats, including PDF, HTML, and EPUB.

Writers, artists, designers, and publishers can communicate to a broader audience than ever before and through an unprecedented variety of media. InDesign supports this with its seamless integration with other Creative Cloud components.

About Classroom in a Book

Adobe InDesign CC Classroom in a Book® is part of the official training series for Adobe graphics and publishing software with the support of Adobe product experts. The lessons are designed so that you can learn at your own pace. If you're new to Adobe InDesign, you'll master the fundamentals and learn to put the software to work for you. If you've already been using Adobe InDesign, you'll find that Classroom in a Book teaches many advanced features, including tips and techniques for using the latest version of InDesign.

Each lesson provides step-by-step instructions for creating a specific project. You can follow the book from start to finish, or do only the lessons that meet your interests and needs. Each lesson concludes with several optional tasks that let you further explore the features covered in the lesson, as well as a set of review questions and answers.

Prerequisites

Before beginning to use *Adobe InDesign CC Classroom in a Book*, you should have a working knowledge of your computer and its operating system. Make sure that you know how to use the mouse and standard menus and commands, and also how to open, save, and close files. If you need to review these techniques, see the printed or online documentation included with your operating system.

Note

When instructions differ by platform, Windows commands appear first, and then the Mac OS commands, with the platform noted in parentheses. For example, "press the Alt (Windows) or Option (Mac OS) key and click away from the artwork." In some instances, common commands may be abbreviated with the Windows commands first, followed by a slash and the Mac OS commands, without any parenthetical reference. For example, "press Alt/Option" or "press Ctrl/Command-click."

Installing the software

Before you begin using *Adobe InDesign CC Classroom in a Book*, make sure that your system is set up correctly and that you've installed the proper software and hardware.

The Adobe InDesign CC software is not included with this book; you must purchase the software separately. (The lessons in this book cannot be performed with the trial version of Adobe InDesign.) In addition to Adobe InDesign CC, some lessons in this book have steps that can be performed with Adobe Bridge and other Adobe applications. You must install these applications from Adobe Creative Cloud onto your computer. Follow the onscreen instructions.

Classroom in a Book fonts

The Classroom in a Book lesson files use fonts that are installed with Adobe InDesign along with free fonts synchronized from the Adobe Typekit online service. When fonts are synchronized, they are automatically downloaded and installed. These fonts are installed in the following locations:

- Windows: [startup drive]\Windows\Fonts\
- Mac OS: [startup drive]/Library/Fonts/

Synchronizing fonts using Adobe Typekit requires an Internet connection. Once a lesson file is open and the fonts are synced, the connection is no longer required. For more information about fonts and installation, see the Adobe InDesign Read Me included with your product.

Accessing the Classroom in a Book files

To work through the projects in this book, you will need to download the lesson files from peachpit.com. You can download the files for individual lessons or download them all in a single file.

Note

Each time you begin working on a new lesson, some panels may remain open even if you restore your InDesign Defaults file. If this occurs, you can close the panels manually if you want.

To access the Classroom in a Book files:

1. On a Mac or PC, go to www.peachpit.com/redeem and enter the code found at the back of your book.
2. If you do not have a peachpit.com account, you will be prompted to create one.
3. The downloadable files will be listed under Lesson & Update Files tab on your Account page.
4. Click the lesson file links to download them to your computer.

Saving and restoring the InDesign Defaults file

The InDesign Defaults file stores program preferences and default settings, such as tool settings and the default unit of measurement. To ensure that the preferences and default settings of your Adobe InDesign program match those used in this book, you should move the current InDesign Defaults file to a different location before you begin working on the lessons. When you have finished the book, you can return the saved InDesign Defaults file to its original folder, which restores the preferences and default settings used before you started working on the lessons.

Note

On Windows 7 and Windows 8, the AppData folder is hidden by default. To display it, click Appearance And Personalization in the Control Panel, and then click Folder Options. Click the View tab in the Folder Options dialog box, select Show Hidden Files, Folders, And Drives, and then click OK.

To save or delete the current InDesign Defaults file, follow these steps:

1. Quit Adobe InDesign.
2. Locate the InDesign Defaults file.
   - In Windows 7 [Service Pack 1] and Windows 8, the InDesign Defaults file is located in the folder [startup drive]\Users\[username]\AppData\Roaming\Adobe\InDesign\Version 10.0\en_US*\InDesign Defaults.
   - In Mac OS, the InDesign Defaults file is located in the folder [startup drive]/Users/[username]/Library/Preferences/Adobe InDesign/Version 10.0/en_US*/InDesign Defaults.

* Folder name may be different depending on the language version you have installed.

Note

In Mac OS 10.7 and later, the Library folder is hidden. To access this folder, choose Go > Go To Folder from the Finder menu. Type **~/Library** in the Go To The Folder box, and then click OK.

When you launch Adobe InDesign after moving the InDesign Defaults file to another folder, a new InDesign Defaults file is automatically created, and all preferences and defaults are reset to their original factory settings.

If you can't find the file, either you haven't started Adobe InDesign CC yet or you have moved the preferences file. The preferences file is created after you quit the program the first time and is updated thereafter.

Note

If hidden files are visible and you still cannot locate the preferences file, use your operating system's Find File feature and search for "InDesign Defaults."

---

3. Copy the file and save it to another folder on your hard disk (if you wish to restore those preferences) or delete it.
4. Start Adobe InDesign CC.

To restore the saved InDesign Defaults file after completing the lessons, follow these steps:

1. Quit Adobe InDesign.
2. Locate your saved InDesign Defaults file, drag it back into its original folder, and replace the current InDesign Defaults file.

Additional resources

Adobe InDesign CC Classroom in a Book is not meant to replace documentation that comes with the program or to be a comprehensive reference for every feature. Only the commands and options used in the lessons are explained in this book. For comprehensive information about program features and tutorials, refer to these resources:

Adobe InDesign Help and Support: helpx.adobe.com/indesign.html is where you can find and browse Help and Support content on Adobe.com. Adobe InDesign Help and Adobe InDesign Support Center are accessible from the Help menu in InDesign.

Adobe Creative Cloud Learn: helpx.adobe.com/creative-cloud/learn/tutorials.html provides inspiration, key techniques, cross-product workflows, and updates on new features. Available to all.

Adobe TV: tv.adobe.com is an online video resource for expert instruction and inspiration about Adobe products, including a How To channel to get you started with your product.

Adobe InDesign CC product home page: www.adobe.com/products/indesign provides information about new features and intuitive ways to create professional layouts for print, tablets, and ebooks.

Resources for educators: www.adobe.com/education and http://edex.adobe.com offer a treasure trove of information for instructors who teach classes on Adobe software. Find solutions for education at all levels, including free curricula that use an integrated approach to teaching Adobe software and can be used to prepare for the Adobe Certified Associate exams.

Tip

To quickly locate the InDesign Defaults file so that you can move or delete it before you begin a new lesson, create a shortcut (Windows) or an alias (Mac OS) to the folder in which the InDesign Defaults file is stored.

Adobe Authorized Training Centers

Adobe Authorized Training Centers offer instructor-led courses and training on Adobe products, employing only Adobe Certified Instructors. A directory of AATCs is available at partners.adobe.com.

Checking for updates

Adobe periodically provides updates to software. You can easily obtain these updates through the Creative Cloud.

1. Introducing the Workspace

Lesson Overview

In this lesson, you'll learn how to do the following:

- Select tools.
- Use the Application bar and Control panel.
- Manage document windows.
- Work with panels.
- Customize the workspace.
- Save your own customized workspace.
- Change the magnification of the document.
- Navigate through a document.
- Use context menus.
- Change Interface preferences.

This lesson will take about 45 minutes to complete.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the "Getting Started" section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.

The intuitive InDesign interface makes it easy to create compelling layouts like this. It is important to understand the InDesign work area to make the most of its powerful layout and design capabilities. The work area consists of the Application bar, Control panel, document window, menus, pasteboard, Tools panel, and other panels.

Getting started

In this lesson, you'll practice using the work area and navigating through a few pages of a simple layout. This is the final version of the document—you won't be changing objects, adding graphics, or modifying text. You will only use this document to explore the InDesign work area.

1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

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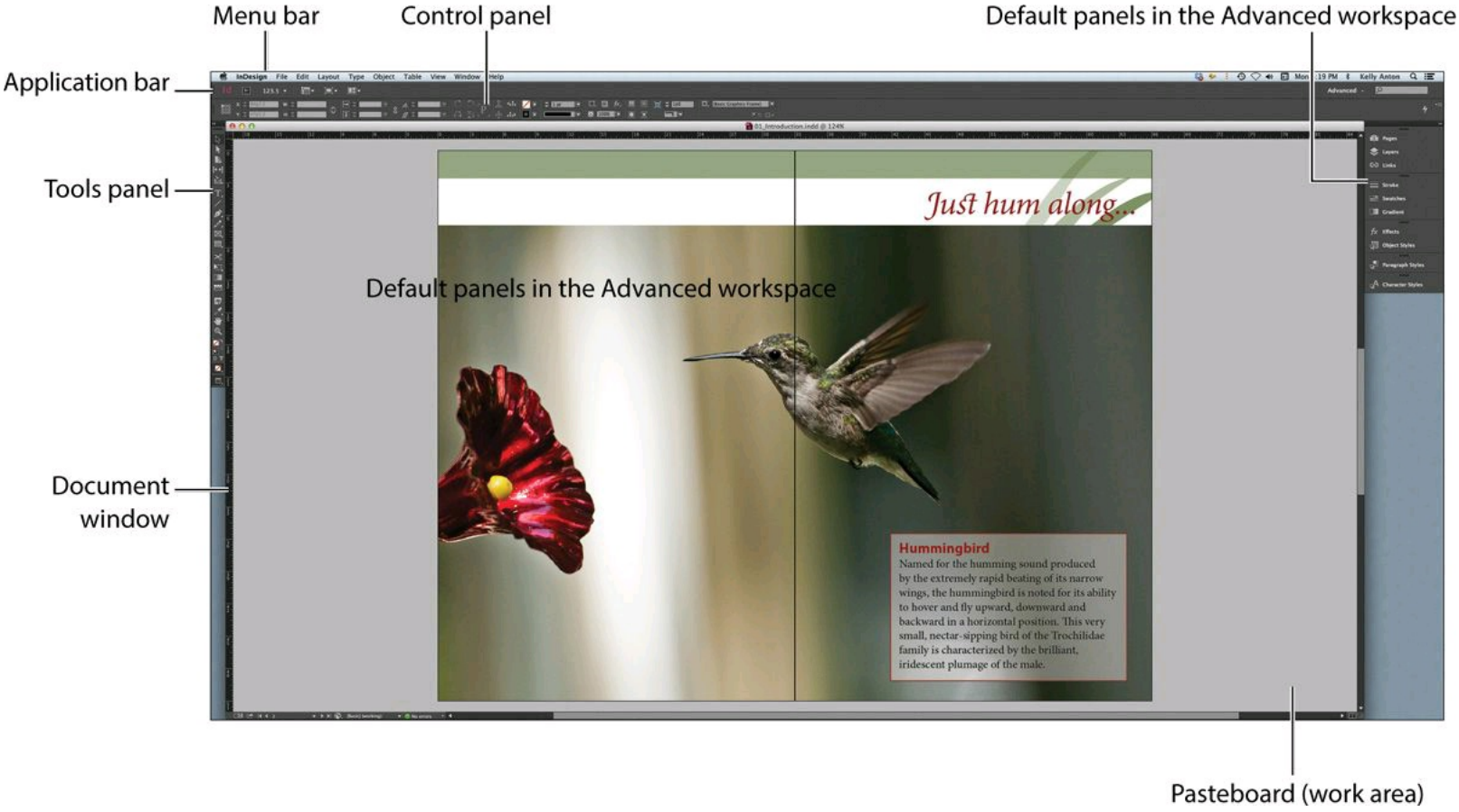
2. Start Adobe InDesign. If the What's New dialog box displays, click Done. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced.
3. Choose File > Open, and open the 01_Start.indd file in the Lesson01 folder, located inside the Lessons folder within the InDesignCIB folder on your hard disk.
4. If the Missing Fonts dialog box displays, click Sync Fonts.
5. Scroll down to see pages 2 and 3 of the document.
6. Choose File > Save As, rename the file **01_Introduction.indd**, and save it in the Lesson01 folder.
7. To display the document at a higher resolution, choose View > Display Performance > High Quality Display.

Looking at the workspace

The InDesign work area encompasses everything you see when you first open or create a document:

- Menu bar and Application bar
- Control panel, Tools panel, and other panels

You can customize the InDesign work area to suit your work style. For example, you can choose to display only the panels you frequently use, minimize and rearrange panel groups, resize windows, add more document windows, and so on. The configuration of the work area is referred to as the workspace. You can save your custom workspace setup or choose among special-purpose configurations such as Digital Publishing, Printing and Proofing, and Typography.



About the Tools panel

The Tools panel contains tools for creating and modifying page objects, adding and formatting text and images, and working with color. By default, the Tools panel is docked to the upper-left corner of the work area. In this exercise, you will undock the Tools panel, change it to horizontal, and experiment with selecting tools.

1. Locate the Tools panel at the far left side of the screen.

Tip

To undock the Tools panel, you can drag either the title bar or the gray dotted bar just below the title bar.

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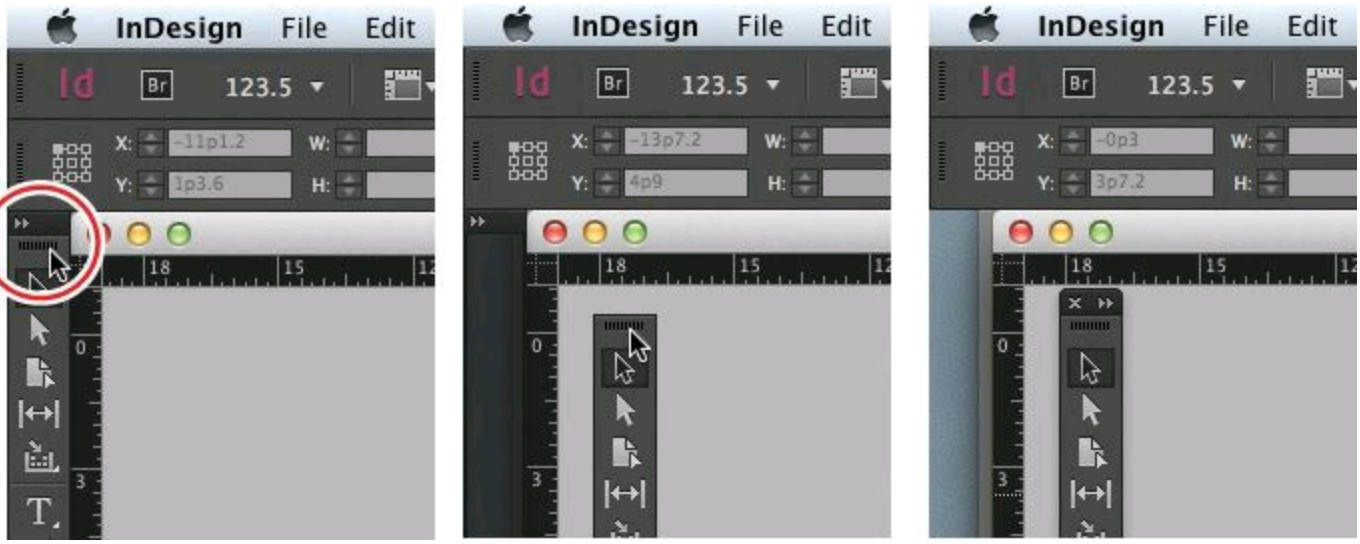
2. To undock the Tools panel and make it float in the workspace, drag the panel by its gray dotted bar to pull it into the pasteboard.



When the Tools panel is floating, it can be a two-column vertical panel, a single-column vertical panel, or a single-column horizontal row.

Note

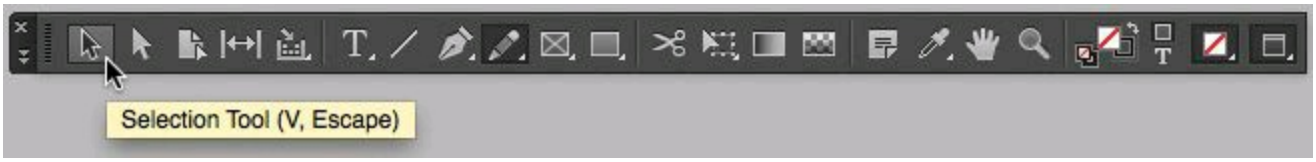
The Tools panel must be floating (not docked) to display horizontally.

---

3. With the Tools panel floating, click the double arrow ( ) at the top of the Tools panel. The Tools panel becomes one horizontal row.

As you work through the lessons in this book, you'll learn about many of the tools' specific functions. Here, you'll familiarize yourself with how to select the tools.

4. Position the pointer over the Selection tool ( ) in the Tools panel. Notice that the tool's name and shortcut are displayed in a tool tip.

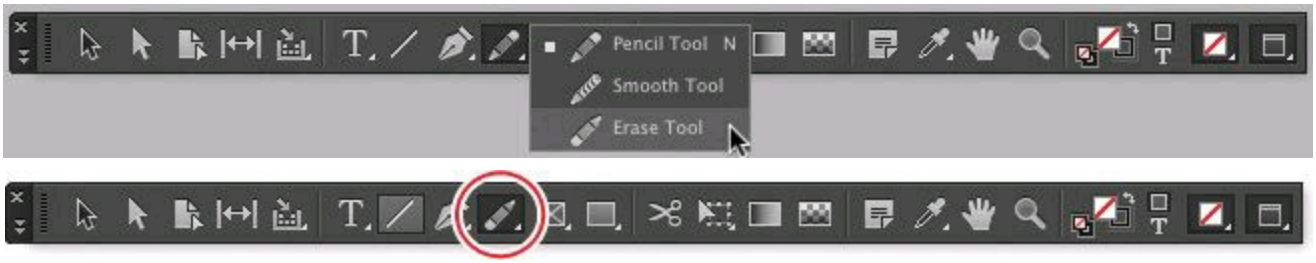


Tip

You can also Alt-click (Windows) or Option-click (Mac OS) a tool in the Tools panel to alternate between the tools in a menu.

Some tools in the Tools panel display a small triangle in the lower-right corner to indicate a pop-out menu of additional tools. To select one of the hidden tools, click and hold on the visible tool to display the menu; then select the tool you want.

5. Click the Pencil tool ( ) and hold down the mouse button to display a menu of tools. Select the Erase tool ( ) and notice how it replaces the Pencil tool.



6. Click the Erase tool again, hold down the mouse button to display the menu, and choose the Pencil tool. This is the default tool that displays.

Note

Controls at the bottom or far right of the Tools panel let you apply colors and change the screen mode.

---

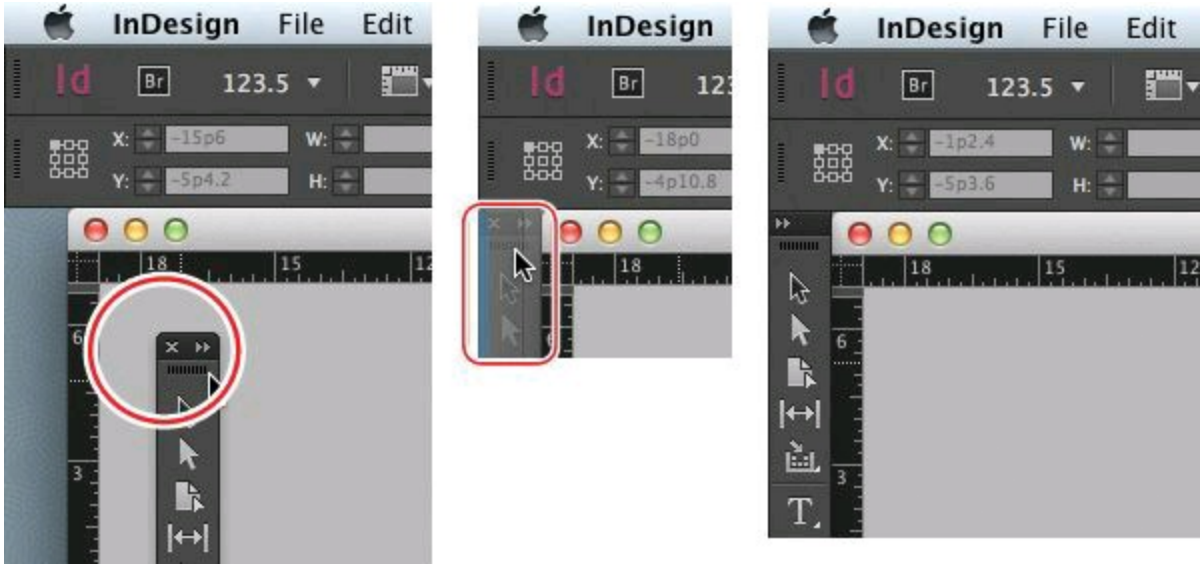
7. Point at each tool in the Tools panel to see its name and keyboard shortcut. For tools with a small triangle, click the tool and hold down the mouse button to see its menu of additional tools. The tools with menus for hidden tools include:
   - Content Collector tool
   - Type tool
   - Pen tool
   - Pencil tool
   - Rectangle Frame tool
   - Rectangle tool
   - Free Transform tool
   - Eyedropper tool

Tip

To select a tool, click its icon in the Tools panel or press the tool's keyboard shortcut (provided there is no text insertion point). The keyboard shortcuts are shown in the tool tips. For example, when you are using the Selection tool, you can press T to switch to the Type tool. In addition, you can press and hold a tool's keyboard shortcut to select a tool temporarily. When you release the key, you revert to the previously selected tool.

---

8. Click the double arrow ( ) in the Tools panel to turn it into a two-column vertical panel. Click the double arrow again to return to the default Tools panel.
9. To dock the Tools panel again, drag the gray dotted line ( ) at the top of the Tools panel to the far left edge of the screen. Release the Tools panel when a blue line appears along the edge of the workspace.



10. If necessary, choose View > Fit Spread In Window to reposition the pages in the center of the document window.

Reviewing the Application bar

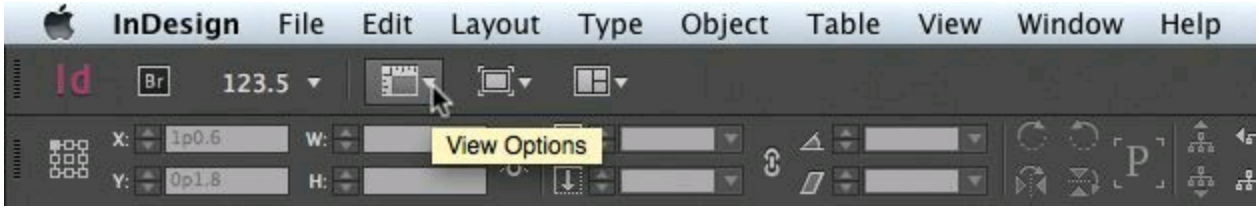
At the top of the default workspace is the Application bar, which lets you launch Adobe Bridge, change the document's magnification, show and hide layout aids such as rulers and guides, change the screen mode among options such as Preview and Presentation mode, and control how multiple document windows display. At the far right, you can select a workspace and search Adobe Community Help resources.

- To get familiar with the controls in the Application bar, point at each to display its tool tip.

Note

Adobe Bridge is an application that is available to Creative Cloud users. You must install it separately from the Creative Cloud desktop application in your menu bar (Mac OS) or task bar (Windows). Alternatively, you can download Adobe Bridge from the Download Center on creative.adobe.com.

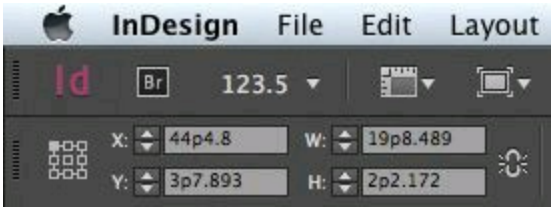
- To show and hide the Application bar in Mac OS, choose Window > Application Bar. When you hide the Application bar in Mac OS, the view scale controls display in the lower-left corner of the document window.
- In Mac OS, the Application bar, document windows, and panels can be grouped into a single unit called the Application frame. To activate the Application frame, choose Window > Application Frame. (This grouping of workspace components in a single application window is the default on Windows.)
- You cannot hide the Application bar when Window > Application Frame is selected in Mac OS, and you cannot hide the Application bar at all in Windows.



Reviewing the Control panel

The Control panel (Window > Control) offers quick access to options for editing selected objects. By default, the Control panel is docked at the top of the screen (below the Application bar in Mac OS and below the menu bar in Windows). However, you can dock it below the document window, convert it to a floating panel, or hide it altogether.

1. Choose View > Screen Mode > Normal so you can see the frames that contain graphics and text.
2. In the Tools panel, select the Selection tool ( ).
3. Click the text “Just hum along...” at the top of the right-facing page. The Control panel now provides options for controlling the position, size, and other attributes of the selected object (a text frame).

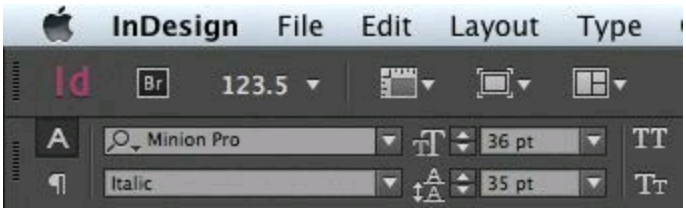


Tip

You can also move and resize objects by entering values in these fields and by dragging objects with the mouse.

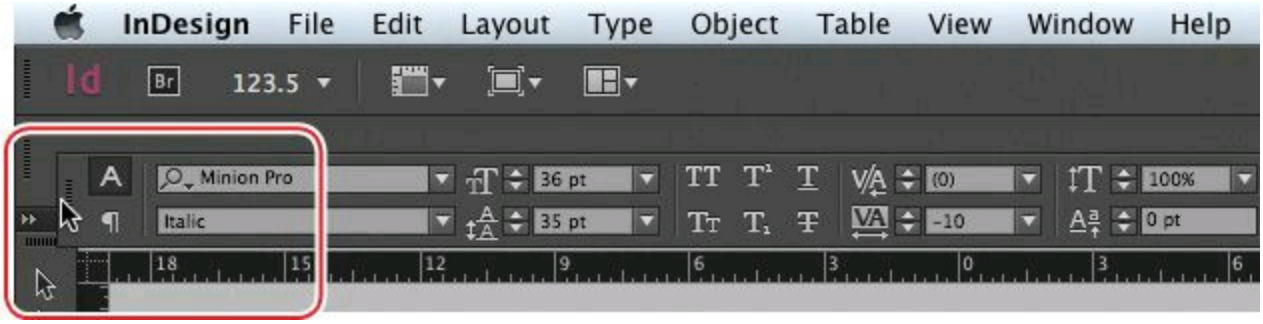
---

4. In the Control panel, click the X, Y, W, and H arrows to see how you can reposition the selected text frame and change its dimensions.
5. In the Tools panel, select the Type tool ( ).
6. Select the text “Just hum along....” The Control panel now provides options for controlling paragraph and character formatting. Click on the pasteboard (the blank area outside the pages) to deselect the text.



7. Choose View > Screen Mode > Preview to hide the frame edges again.

   The Control panel can be moved if you don’t like it docked at the top of the document window.
8. In the Control panel, drag the vertical dotted bar at the left into the document window. Release the mouse button to make the panel float.



9. To dock the Control panel again, click its panel menu button ( ) at the far right and choose Dock At Top.

Reviewing the document window and pasteboard

The document window contains all the pages in the document. Each page or spread is surrounded by its own pasteboard, which can store objects for the document as you create a layout. Objects on the pasteboard do not print. The pasteboard also provides additional space along the edges of the document for extending objects past the page edge (called a bleed). Bleeds are used when an object must print to the edge of a page. Controls for displaying different pages in the document are in the lower-left corner of the document window.

1. To make sure the panels are back in the correct position, choose Window > Workspace > Reset Advanced.

Tip

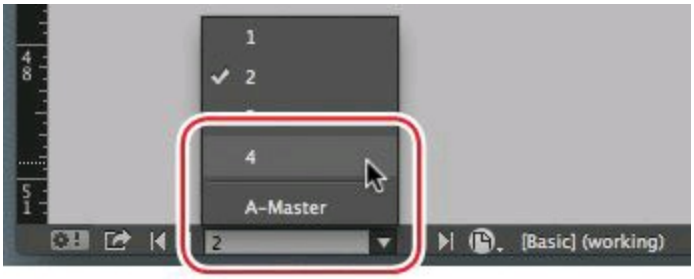
You can use the pasteboard as a work area or a storage area. For example, many users work on complex drawings on the pasteboard, or they import multiple image and text files at one time and store them on the pasteboard until they're needed.

---

2. To see more pages in the document and the document's pasteboard, choose 25% from the Zoom Level menu on the Application bar.
3. If necessary, click the Maximize button to enlarge the document window.
   - In Windows, the Maximize button is the middle box in the upper-right corner of the window.
   - In Mac OS, the Maximize button is the green button in the upper-left corner of the window.
4. To view the page bleeds set up for this document, choose View > Screen Mode > Bleed.
5. Choose View > Screen Mode > Preview and then View > Fit Spread In Window to restore the view.
6. Choose View > Fit Spread In Window and scroll as necessary to see pages 2 and 3 of the document.

   Now you'll move to another page.

7. In the lower-left corner of the document window, click the arrow next to the Page Number box to display a menu of document pages and master pages.
8. Choose 4 from the menu to display page 4 in the document window.



9. Click the arrow to the left of the Page Number box to turn to pages 2–3.

Working with multiple document windows

When you open multiple documents, each document displays in its own tab of the main document window. You can also open multiple windows for a single document so you can see different parts of the layout at one time. Here, you'll create a second window so you can see how changes to the headline might affect the entire page. The techniques you use here for arranging document windows can be used with different views of the same document and for any other open documents.

1. Choose Window > Arrange > New Window For 01_Introduction.indd.

   A new window, titled 01_Introduction.indd:2, opens. The original window is now titled 01_Introduction.indd:1.

Tip

The Application bar provides quick access to options for managing windows. Click the Arrange Documents button to see all the options.

---

2. If necessary, in Mac OS, choose Window > Arrange > Tile to display both windows onscreen.
3. Select the Zoom tool ( ) in the Tools panel.
4. In the second window, 01_Introduction.indd:2, draw a marquee around the white box containing the words "Just hum along..." to zoom in on the text.

   Notice that the other window stays at its original magnification.

5. Choose Window > Arrange > Consolidate All Windows. This creates a tab for each window.

6. Click the tabs in the upper-left corner (below the Control panel) to control which document window displays.

Note

If necessary, in Mac OS, resize and reposition the remaining window by clicking the Maximize button at the top of the document window.

---

7. Close the 01_Introduction.indd:2 window by clicking the Close Window button on the tab. The original document window remains open.
8. If necessary, choose View > Fit Spread In Window.

Working with panels

Panels provide quick access to commonly used tools and features. By default, panels are docked at the right side of the screen (except the aforementioned Tools panel and Control panel). The panels that display by default are different depending on the selected workspace, and each workspace remembers its panel configuration. You can reorganize panels in various ways. Here, you'll experiment with opening, collapsing, and closing the default panels in the Advanced workspace.

Expanding and collapsing panels

In this exercise, you will expand and collapse a panel, hide the panel names, and expand all the

panels in the dock.

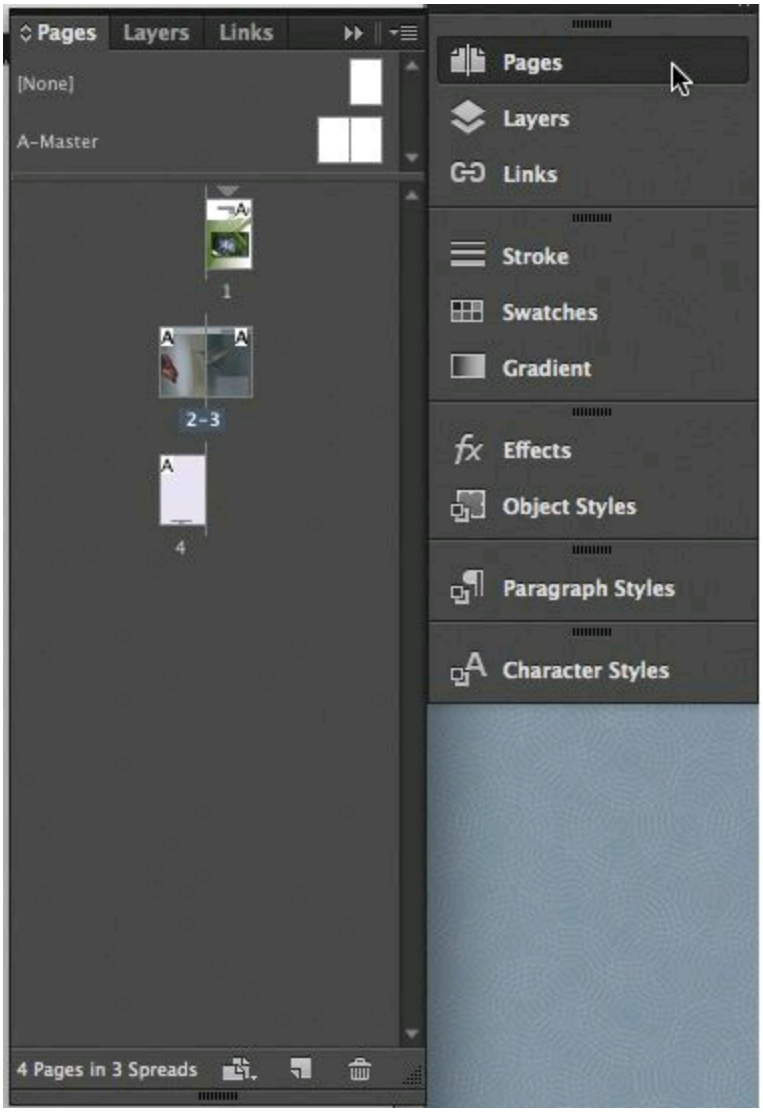
Note

A dock is a collection of panels that are “glued” together.

---

1. In the default dock to the right of the document window, click the Pages panel icon to expand the Pages panel. This technique is handy if you want to open a panel, use it briefly, and then close it.

   You can choose from several techniques to collapse a panel.



2. When you’ve finished using the Pages panel, click the double arrow ( ) to the right of the panel names or click the Pages panel icon again to collapse the panel.

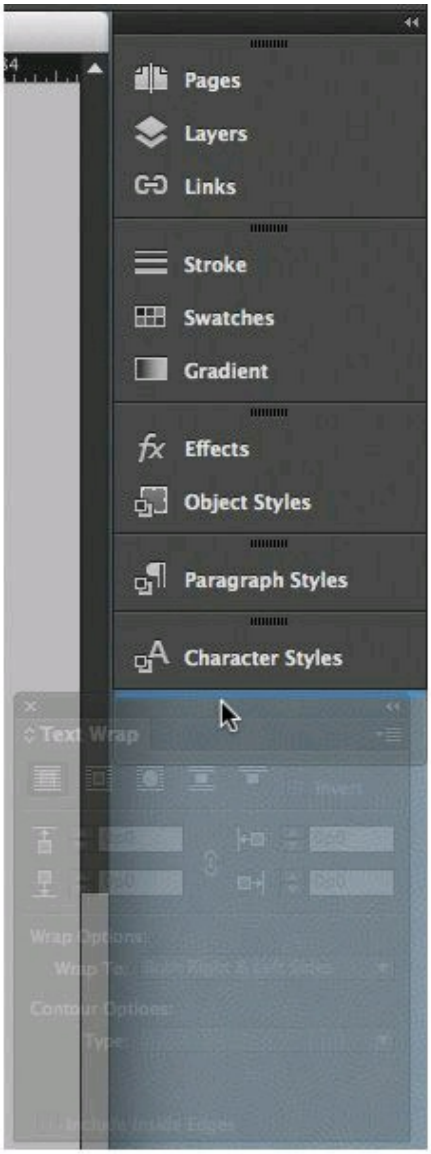
Tip

To display a hidden panel, choose the panel name from the Window menu (or a submenu of the Window menu). If the panel name has a check mark, it is already open and in front of any other panels in its panel group.

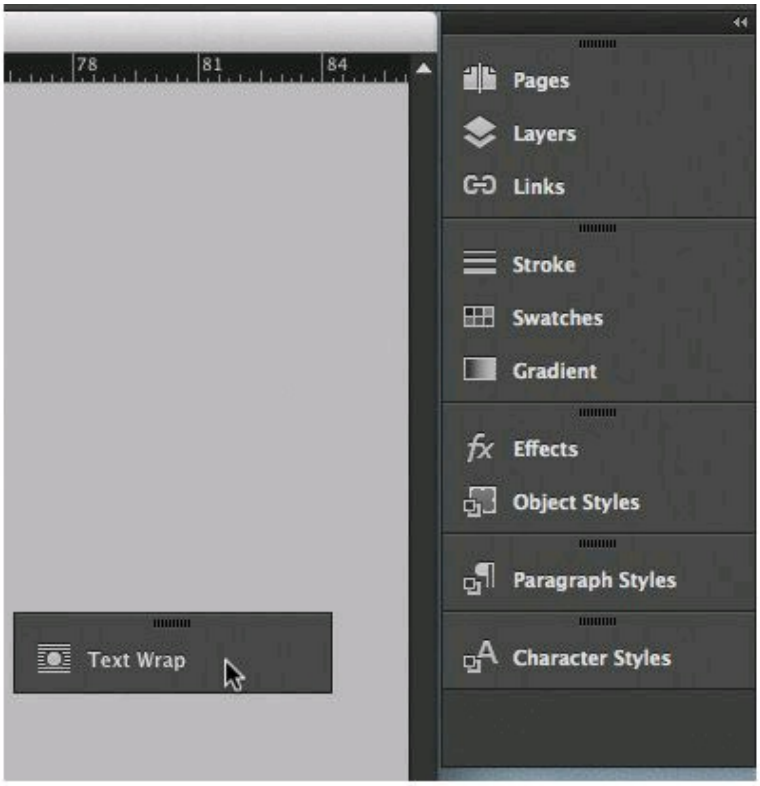
Now you’ll open a panel by choosing it from the menu bar.

3. Choose Window > Text Wrap to display the Text Wrap panel.

4. To add the Text Wrap panel to the bottom of the dock, drag it by its title bar below the Character Styles panel. Release the mouse button when the blue line appears.
5. To view the Text Wrap panel's controls, choose Window > Text Wrap.
6. To close the Text Wrap panel, drag it off the dock and click its close box.



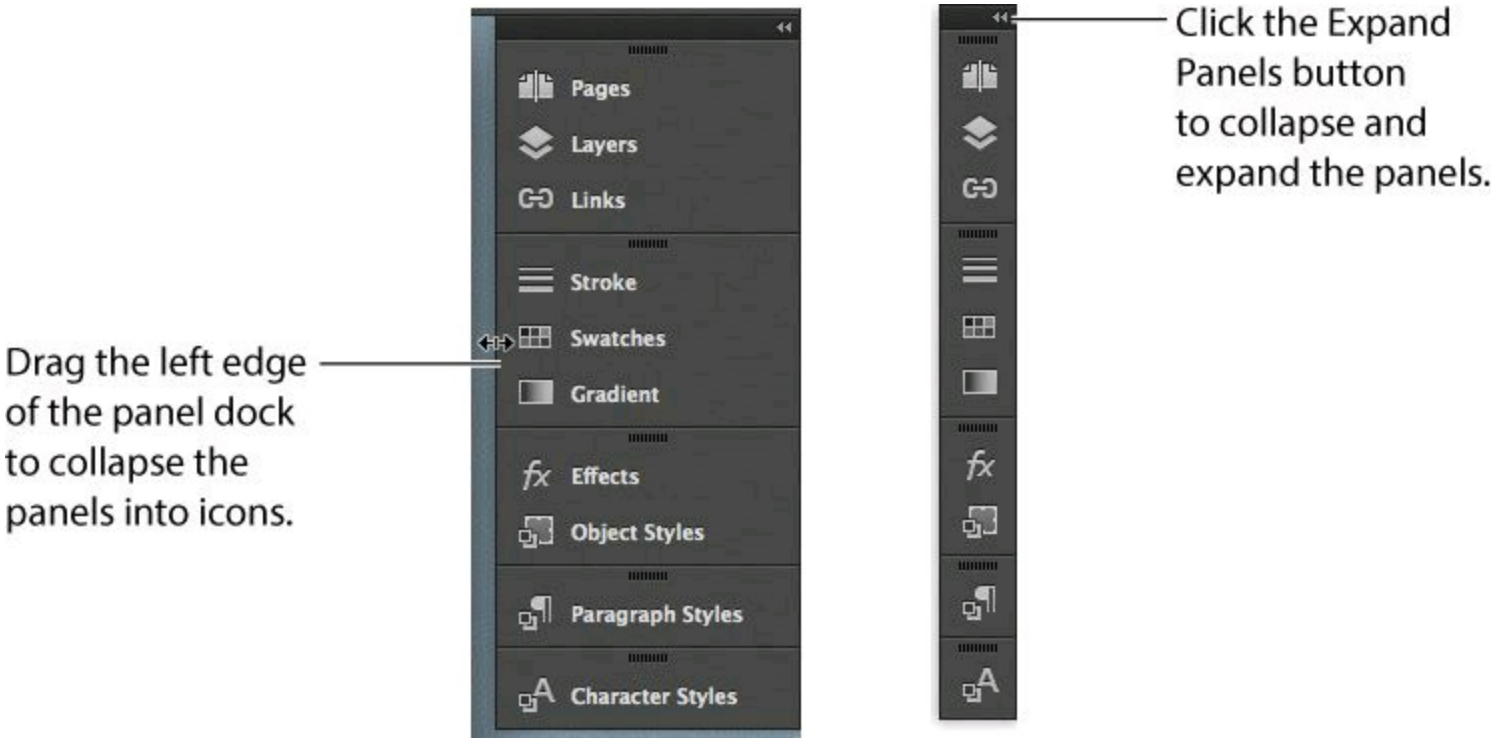
Dragging a panel to the dock.



Dragging a panel off the dock.

A freestanding panel you can move, expand, or close.

7. To reduce the width of the panel dock, drag the left edge of the panel dock to the right until the names are hidden.



8. To expand all the panels in the dock so you can see all their controls, click the double arrow ( ) in the upper-right corner of the dock.

   If you click the double arrow ( ) again, the panels collapse back to icons without names. For the next exercise, you will leave the panels expanded.

Rearranging and customizing panels

In this exercise, you will drag a single panel out of the dock to create a free-floating panel. Then, you will drag another panel into that panel to create a custom panel group. You will also ungroup the panels, stack them, and minimize them.

Tip

A detached panel is called a floating panel. Click the double arrow on a floating panel's title bar to expand or minimize it.

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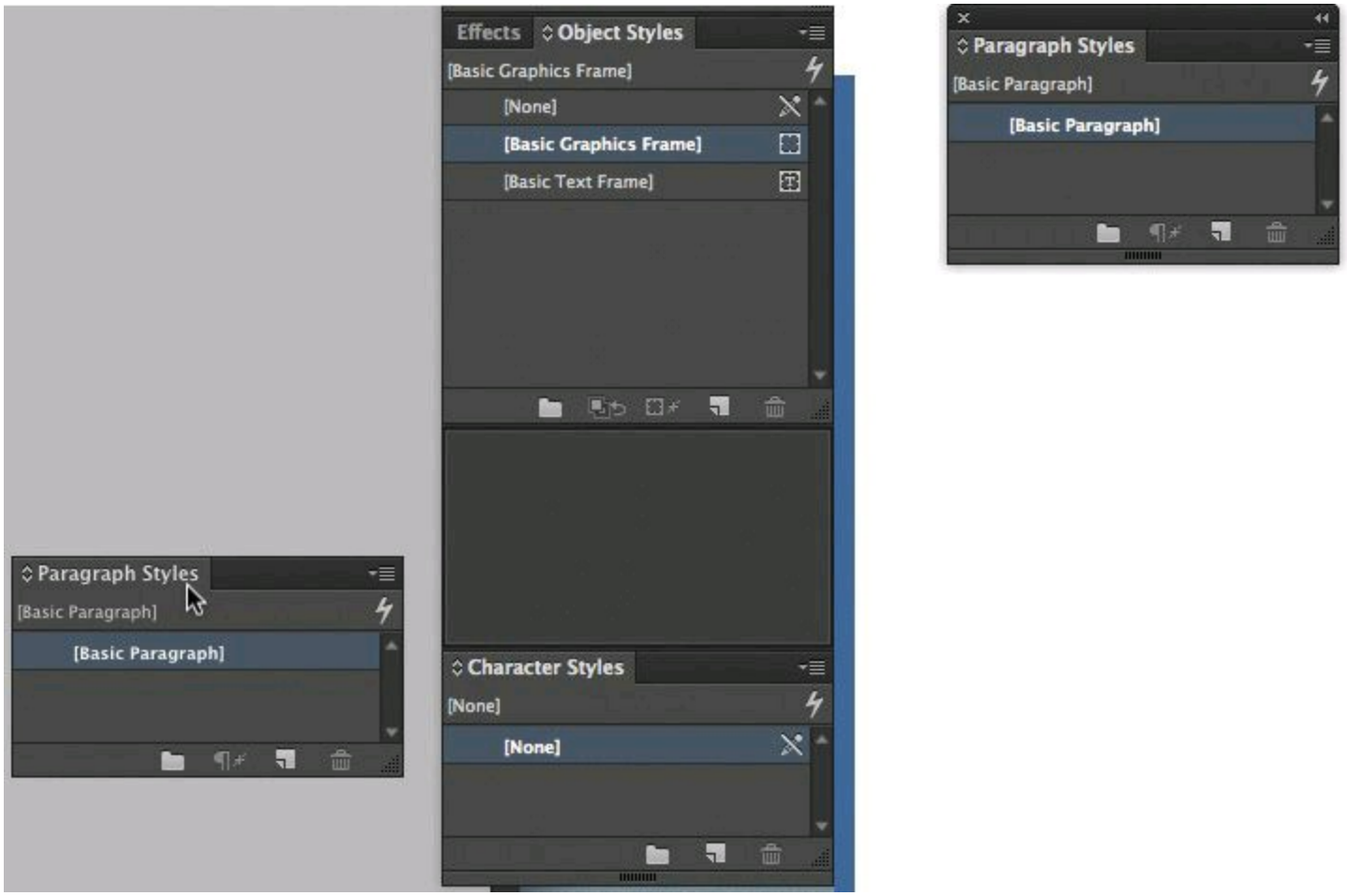
1. With the dock expanded, drag the tab of the Paragraph Styles panel to remove the panel from the dock.



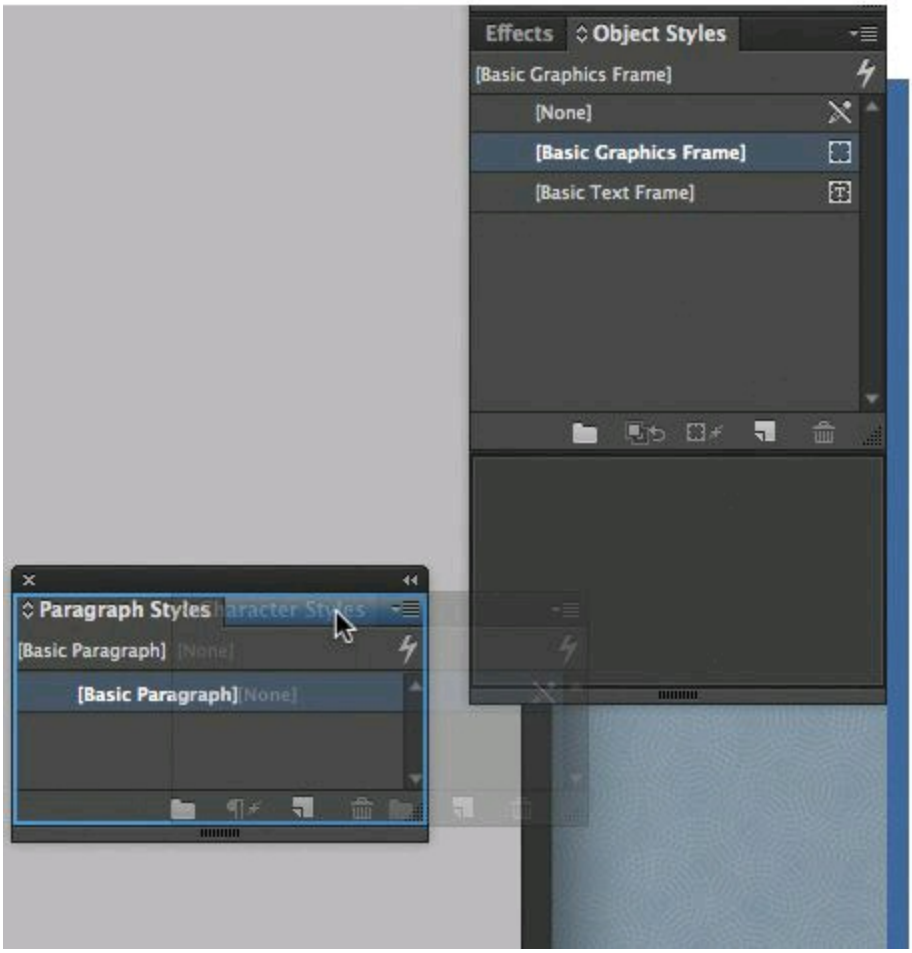
Tip

Grouping the Character Styles and Paragraph Styles panels can be helpful if you are formatting text. You can put this panel group in a handy location while leaving the remaining panels collapsed and out of the way.

---

2. To add the Character Styles panel to the floating Paragraph Styles panel, drag its tab into the gray area to the right of the Paragraph Styles panel tab. Release the mouse button when the blue line appears along the perimeter of the Paragraph Styles panel.

   This action creates a panel group; you can drag any panel into a group.



Tip

As you become comfortable with InDesign, experiment with configuring the panels and workspace to best meet your needs. You will soon find out which panels you use the most, where you like to keep them, and what size is best for your needs.

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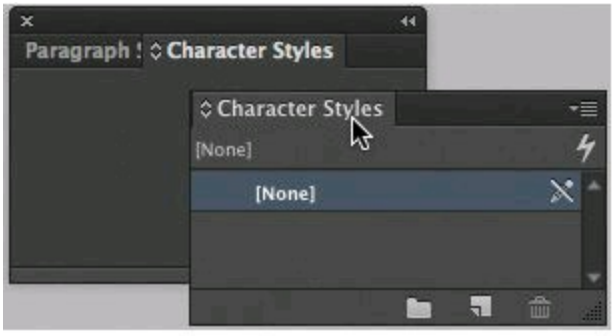
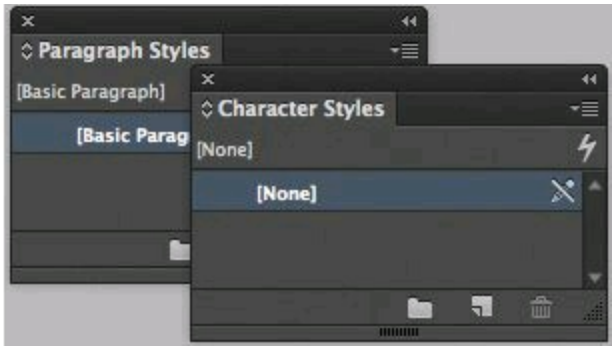
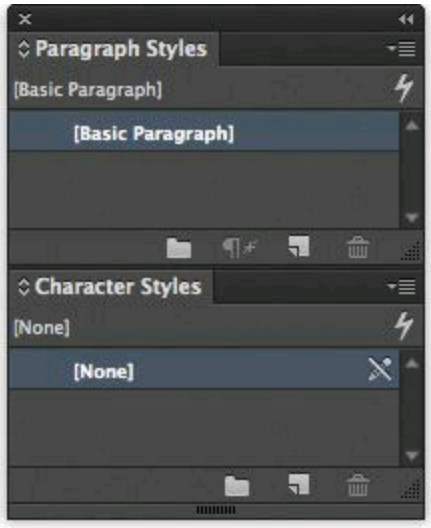
3. To ungroup the panels, drag one of the panel tabs out of the panel group.





You can also stack floating panels in a vertical arrangement. You'll try that now.

4. Drag the tab of the Character Styles panel to the bottom of the Paragraph Styles panel. Release the mouse button when a blue line appears.



The panels are now stacked rather than grouped. Stacked panels attach vertically to each other. You can move the panels as a unit by dragging the topmost title bar. Next, you'll experiment with resizing the stacked panels.

Tip

For floating panels, you can change the width and height by dragging the lower-right or lower-left corner, change the depth by dragging the bottom, and change the width by dragging the left or right edge of the panel. For docked panels, you can change the width and height by dragging the lower-left corner, change the width by dragging the left edge, or change the depth by dragging the bottom of the panel.

---

5. Drag the lower-right corner of a panel to resize it.
6. Regroup the panels by dragging the tab of the Character Styles panel up next to the Paragraph Styles panel tab.
7. Minimize the panel group by double-clicking the gray area next to a panel's tab. Double-click the area again to expand the panels.

8. Minimize the panel group by double-clicking the gray area next to a panel's tab. Double-click the area again to expand the panels.

   Leave the panels this way to be saved with a workspace in a later exercise.

Using panel menus

Most panels have additional panel-specific options. To access these options, you click the panel menu button to display a menu with additional commands and options for the selected panel.

In this exercise, you will change the display of the Swatches panel.

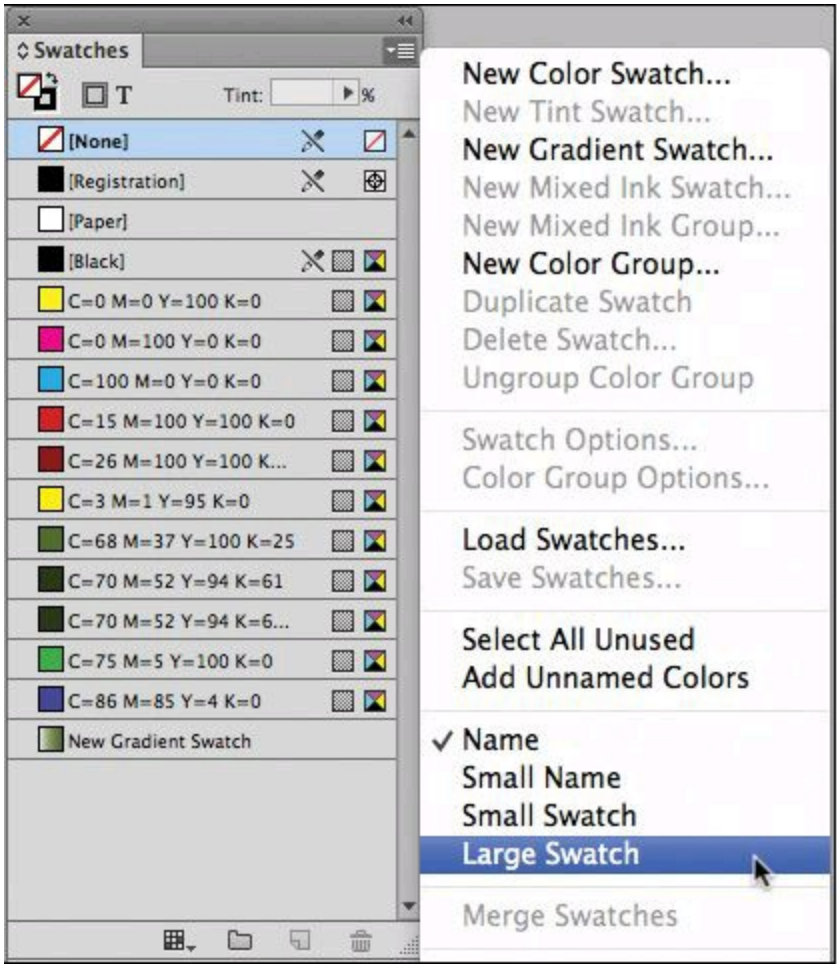
Note

If necessary, click the double arrow ( ) in its title bar to expand the panel.

---

1. Drag the Swatches panel out of the dock at the right to create a free-floating panel.
2. In the upper right of the Swatches panel, click the panel menu button ( ) to display the panel menu.

   You can use the Swatches panel menu to create new color swatches, load swatches from another document, and more.
3. Choose Large Swatch from the Swatches panel menu.
4. Leave the panels this way to be saved with a workspace in a later exercise.



Customizing the workspace

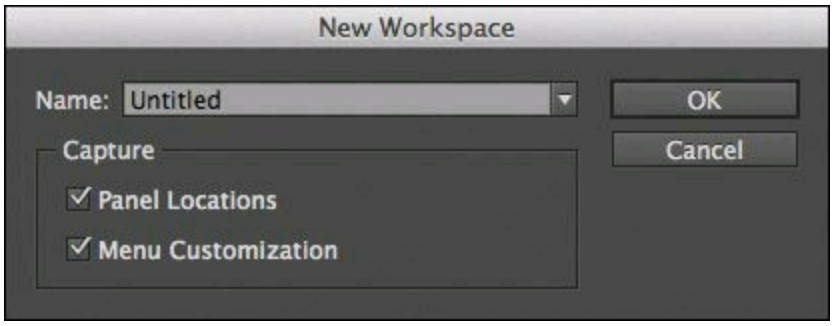
A workspace is a configuration of panels and menus. (The configuration of document windows is not saved in workspaces.) InDesign provides a variety of workspaces for special purposes, such as Digital Publishing, Printing and Proofing, and Typography. You cannot modify the provided workspaces, but you can save your own. In this exercise, you will save the panel customizations from the previous exercises. In addition, you will customize the appearance of the interface.

Tip

To further customize the work-space, you can control which commands appear in the InDesign menus by choosing Edit > Menus. For example, you might prefer shorter menus for use on a smaller laptop screen, or you might want to streamline the commands available to a new user. You can save the menu customization with your saved workspaces.

---

1. Choose Window > Workspace > New Workspace.



2. In the New Workspace dialog box, type Swatches and Styles in the Name box. If necessary, select Panel Locations and Menu Customization. Click OK.

Tip

You can also manage and select workspaces from the Workspace menu on the far right side of the Application bar.

---

3. Choose Window > Workspace to see that your custom workspace is selected. Choose each workspace to see the different default configurations. Click the menus to see the commands available in addition to looking at the panels.
4. Click OK.
5. Choose Window > Workspace > Advanced, and then choose Window > Workspace > Reset Advanced.

Changing the magnification of a document

Controls in InDesign let you view documents at any level from 5% to 4000%. When a document is open, the current magnification percentage is displayed in the Zoom Level box in the Application bar and next to the filename in the document's tab or title bar.

Using the view commands

You can easily enlarge or reduce the view of a document by doing any of the following:

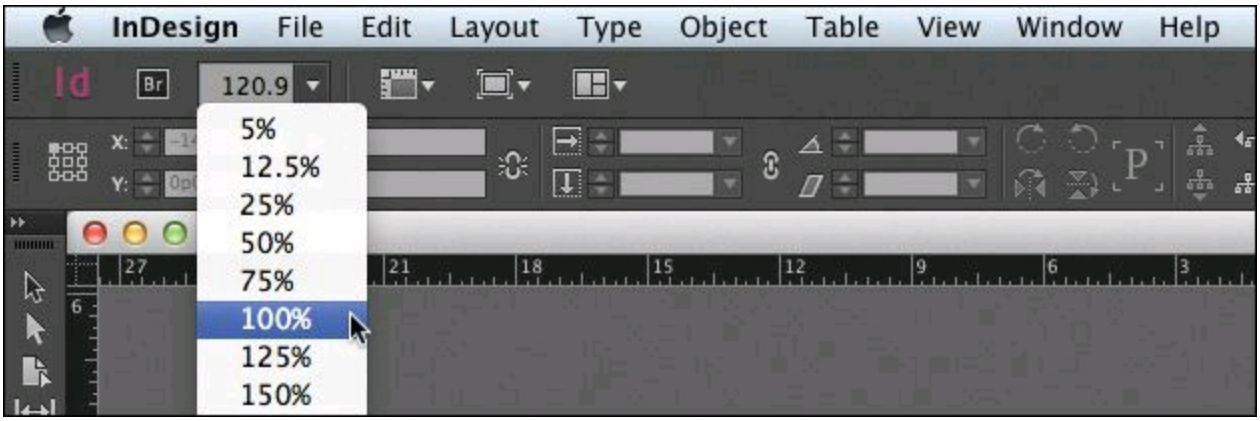
- Choose View > Zoom In to enlarge the display by one preset increment.
- Choose View > Zoom Out to reduce the display by one preset increment.
- Choose View > Fit Page In Window to center and display the targeted page in the window.
- Choose View > Fit Spread In Window to center and display the targeted spread in the window.

Tip

Keyboard shortcuts let you quickly change the view to 200%, 400%, and 50%. In Windows, press Ctrl+2 for 200%, Ctrl+4 for 400%, and Ctrl+5 for 50%. In Mac OS, press Command+2 for 200%, Command+4 for 400%, and Command+5 for 50%.

- Choose View > Actual Size to display the document at 100%. (Depending on the dimensions of your document and your screen resolution, you may or may not see the entire document onscreen.)

- Choose a percentage from the Zoom Level menu in the Application bar to enlarge or reduce the display by any preset increment.



Note

if you close the Application bar in Mac OS, the zoom controls appear in the lower-left corner of the document window.

- Type a percentage in the Zoom Level box by placing an insertion point in the box, typing the desired viewing percent, and then pressing the Enter or Return key.
- Press Ctrl+= (Windows) or Command+= (Mac OS) to increase the magnification.
- Press Ctrl+- (Windows) or Command+- (Mac OS) to decrease the magnification.

Using the Zoom tool

In addition to the view commands, you can use the Zoom tool to magnify and reduce the view of a document. In this exercise, you will experiment with the Zoom tool.

1. Choose View > Fit Spread In Window to position pages 2 and 3 in the center of the window.
2. Select the Zoom tool ( ) in the Tools panel and position it over the text at the right. Notice that a plus sign appears in the center of the Zoom tool.
3. Click three times. The view changes to the next preset magnification, centered on the point where you clicked.

   Now you'll reduce the view.
4. Position the Zoom tool over the text and hold down the Alt (Windows) or Option (Mac OS) key. A minus sign appears in the center of the Zoom tool.
5. While holding the Alt or Option key, click three times to reduce the view scale.

   You can also use the Zoom tool to drag a marquee around a portion of a document to magnify a specific area.
6. With the Zoom tool still selected, hold down the mouse button to drag a marquee around the text, and then release the mouse button.

   The percentage by which the area is magnified depends on the size of the marquee: the smaller the marquee, the larger the degree of magnification.

Because the Zoom tool is used frequently during the design and editing processes, you can temporarily select it from the keyboard at any time without deselecting the tool you are using. You'll do that now.

7. Click the Selection tool ( ) in the Tools panel and position it anywhere in the document window.

Note

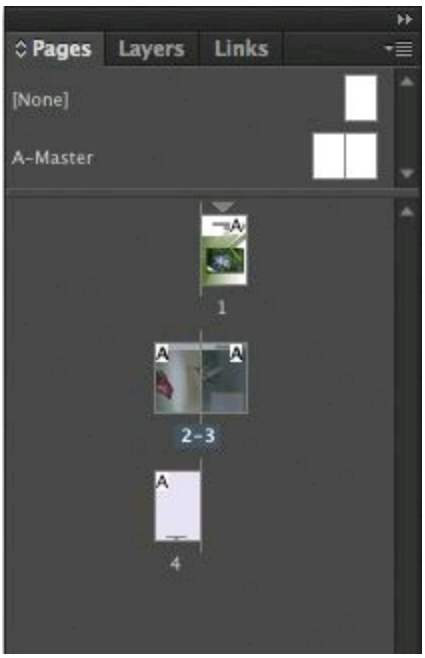
Mac OS may override the zooming keyboard shortcut. You can disable system shortcuts in System Preferences > Keyboard.

---

8. Hold down Ctrl+spacebar (Windows) or Command+spacebar (Mac OS) so that the Selection tool icon becomes the Zoom tool icon, and then click the hummingbird to magnify the view. When you release the keys, the pointer returns to the Selection tool.
9. You can cut off the panel shown below to fit this text. This is something that arose due to new Mac OS.
10. Choose View > Fit Spread In Window to center the pages again.

Navigating through a document

There are several different ways to navigate through an InDesign document, including using the Pages panel, the Hand tool, the Go To Page dialog box, and controls in the document window.



Turning pages

You can turn pages using the Pages panel, the page buttons at the bottom of the document window, the scroll bars, or a variety of other methods. The Pages panel displays all the pages in your document. Double-clicking any page icon or page number in the panel brings that page or spread into view. In this exercise, you will experiment with turning pages.

1. Click the Pages panel icon to expand the Pages panel, if necessary.

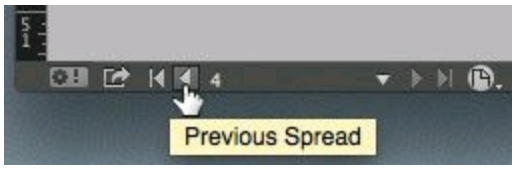
Tip

To turn pages, you can also use commands in the Layout menu: First Page, Previous Page, Next Page, Last Page, Next Spread, and Previous Spread.

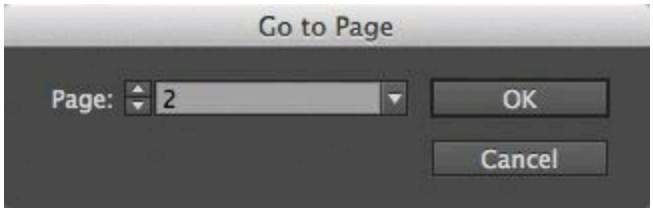
---

2. Double-click the page 1 icon to center the first page in the document window.
3. Double-click the page 4 icon to display it in the document window.
4. To return to the first page of the document, use the menu in the lower-left corner of the document window. Click the down arrow and choose 1.

   You will now use the buttons at the bottom of the document window to display a different page. Note that when View > Fit Spread In Window is selected, the navigation controls are for spreads rather than pages.
5. Click the Next Spread button (the right-facing arrow) next to the Page Number box until the fourth page is displayed.
6. Click the Previous Spread button (left-facing arrow) next to the Page Number box to switch pages until the first page is displayed.



7. Choose Layout > Go To Page.
8. In the Page box, type **2** or select 2 from the menu. Click OK.



Using the Hand tool

The Hand tool in the Tools panel lets you "push" the pages of a document around until you find exactly what you want to view. In this exercise, you will experiment with the Hand tool.

Tip

When you're using the Selection tool, you can press the spacebar to temporarily access the Hand tool. When you're using the Type tool, press the Alt (Windows) or Option (Mac OS) key to use the Hand tool.

---

1. Choose 400% from the Zoom Level menu on the Application bar.
2. Select the Hand tool ( ).
3. Click and drag in any direction to move the page around, and then drag downward in the document window to display page 1.
4. With the Hand tool still selected, click the page and hold the mouse button down to display a view rectangle.
   - Drag the rectangle to view a different area of the page or a different page.
   - Release the mouse button to display the area that the view rectangle encompasses.
   - When the view rectangle is displayed, press the arrow keys on the keyboard to increase and decrease the rectangle's size.

5. Double-click the Hand tool in the Tools panel to fit the page in the window.

Using context menus

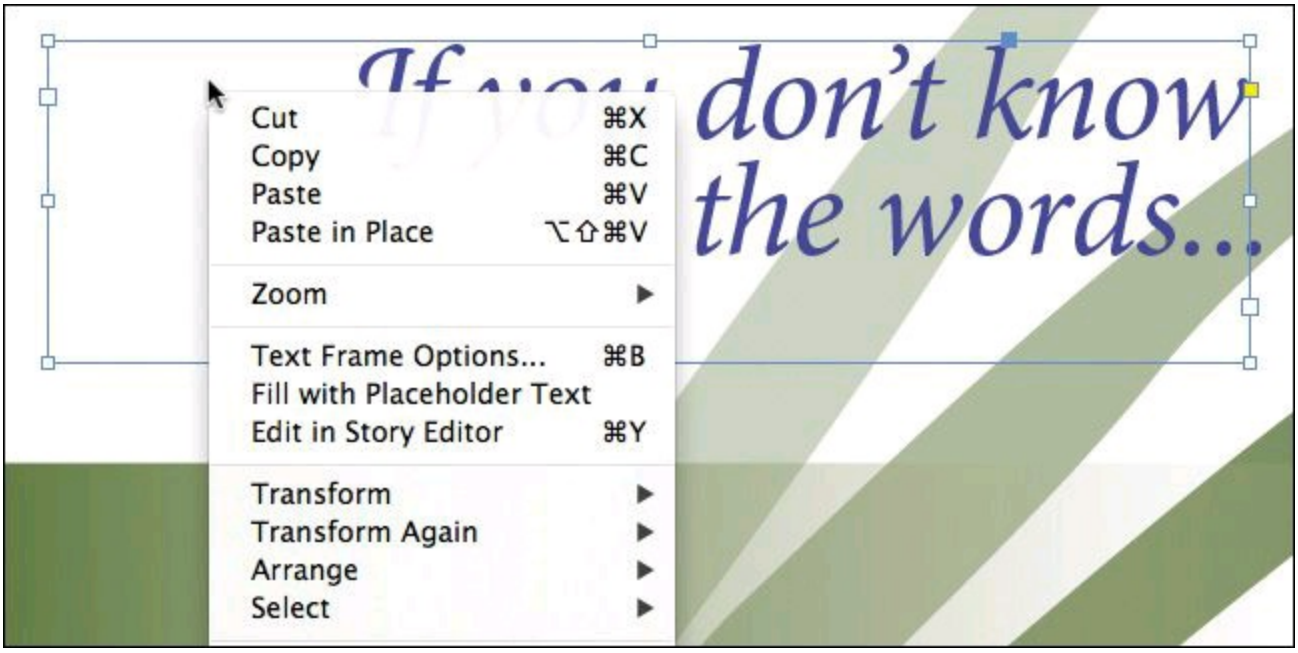
In addition to the menus at the top of your screen, you can use context menus to display commands relevant to the active tool or selection. To display context menus, position the pointer over a selected object or anywhere in the document window and click with the right mouse button (Windows) or press Control and hold down the mouse button (Mac OS).

Tip

You can display a context menu when you are entering or editing text. The Type context menu lets you insert special characters, check spelling, and perform other text-related tasks.

---

1. Using the Selection tool ( ), click any object on the page, such as the text frame containing the words "If you don't know the words...."
2. Right-click (Windows) or Control-click (Mac OS) the text frame. Note what options are available.
3. Select different types of objects on the page and display their context menus to see what commands are available.



Modifying Interface preferences

You can customize the InDesign interface by changing its color, the way various tools work, and how the panels are configured through preferences. Some settings in the Preferences dialog box affect the application (InDesign itself), while others affect only the active document. If you change the latter preferences while no documents are open, the changes affect all new documents. Here, you will look at Interface preferences, which affect the application.

Tip

Click through the panels in the Preferences dialog box to see other options for customizing InDesign. For example, the Display Performance preference lets you specify how images display in all your InDesign documents (Fast, Typical, High Quality). You changed the Display Performance at the beginning of this exercise through the View menu, but the change is temporary and not saved with the document. Changing the preference would affect all documents.

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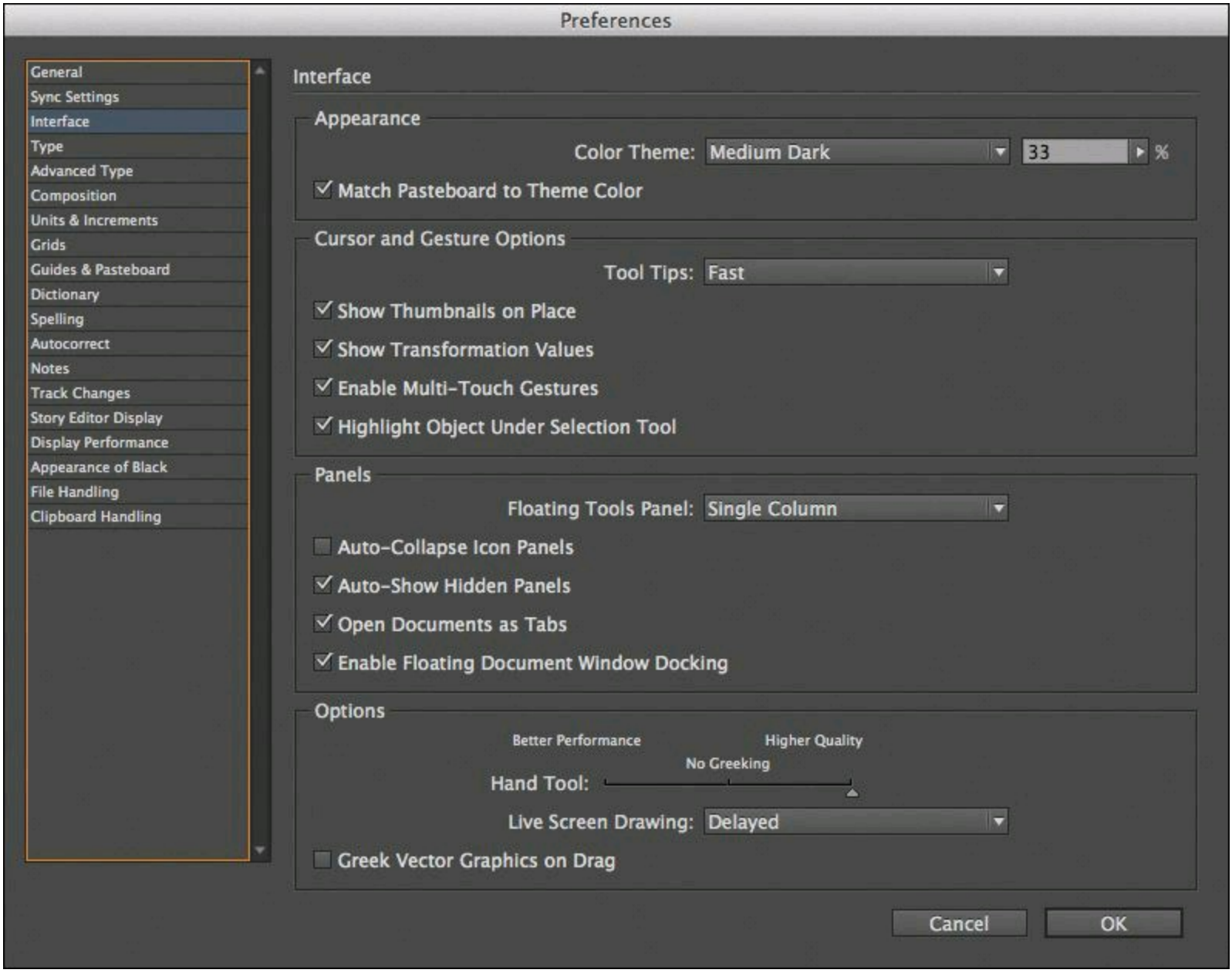
1. Choose Edit > Preferences > Interface (Windows) or InDesign > Preferences > Interface (Mac OS) to customize the appearance of InDesign.
2. Choose Dark from the Color Theme menu to see the darker interface look.
3. Experiment with the other options, and then choose Medium Dark again.
4. Notice the other commands available in the Interface pane, such as the Panels options, then click OK.



Exploring on your own

Now that you have explored the work area, try some of the following tasks using either the 01_Introduction.indd document or your own document.

Tip

For complete and up-to-date information about using InDesign panels, tools, and other application features, use the Help menu and the Search box in the Application bar.

- Choose Window > Utilities > Tool Hints to display information about the selected tool. Select various tools to learn more about them.
- Choose Window > Info to display the Info panel. Notice the information provided about the document when no objects are selected. Click to select individual objects and see how the Info panel changes as you select them.
- Learn more about existing key commands and how you can change them by exploring the Keyboard Shortcuts dialog box (Edit > Keyboard Shortcuts).

- Review the menu configurations and how you can edit them in the Menu Customization dialog box (Edit > Menus).
- Try organizing your panels to meet your needs, and create your own workspace by choosing Window > Workspace > New Workspace.
- To familiarize yourself with the types of changes Adobe makes in each release, choose Help > What's New. Scroll through the dialog box to see information about new features. If you prefer not to view this dialog box each time you launch InDesign, select Don't Show Again in the lower left corner, then click Done.

Review questions

1. What are some ways you can change the magnification of a document?
2. How do you select tools in InDesign?
3. What are three ways to display a panel?
4. How do you create a panel group?

Review answers

1. You can choose commands from the View menu to zoom in, zoom out, fit the page to the window, and more. You can also use the Zoom tool in the Tools panel and click or drag over a document to enlarge or reduce the view. In addition, you can use keyboard shortcuts to magnify or reduce the display. You can also use the Zoom Level box in the Application bar.
2. You can click to select a tool in the Tools panel, or you can press the tool's keyboard shortcut. For example, you can press **V** to select the Selection tool from the keyboard; press and hold the keyboard shortcut to temporarily select the tool. You select tools hidden in pop-out menus by positioning the pointer over a tool in the Tools panel and holding down the mouse button. When the menu appears, select the tool.
3. To make a panel appear, click its icon, click its tab, or choose its name from the Window menu. For example, choose Window > Object & Layout > Align. You can also access type-specific panels from the Type menu. For example, choose Type > Glyphs.
4. Drag a panel off the dock to create a free-floating panel. Drag the tab of any other panel into the tab bar of the new, free-floating panel. A panel group can be moved and resized as one panel.

2. Getting to Know InDesign

Lesson Overview

In this lesson, you'll learn how to do the following:

- View layout aids.
- Check on potential production issues with the Preflight panel.
- Type and style text.
- Import text and thread text frames.
- Import, crop, and move graphics.
- Work with objects.
- Automate formatting with paragraph, character, and object styles.
- Preview a document in Presentation mode.

This lesson will take about 1 hour to complete.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the "Getting Started" section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.

The building blocks of an InDesign layout are objects, text, and graphics. Layout aids such as guides help with size and placement, and styles let you format page elements automatically.

Getting started

The document for this lesson is a standard-size postcard designed to be printed and mailed. In addition, the postcard can be exported as a PDF to use in email marketing. As you will see in this lesson, the building blocks of an InDesign document are the same, regardless of the output media. In this lesson, you will add the text, images, and formatting necessary to finish the 6″ × 4.25″ postcard.

1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

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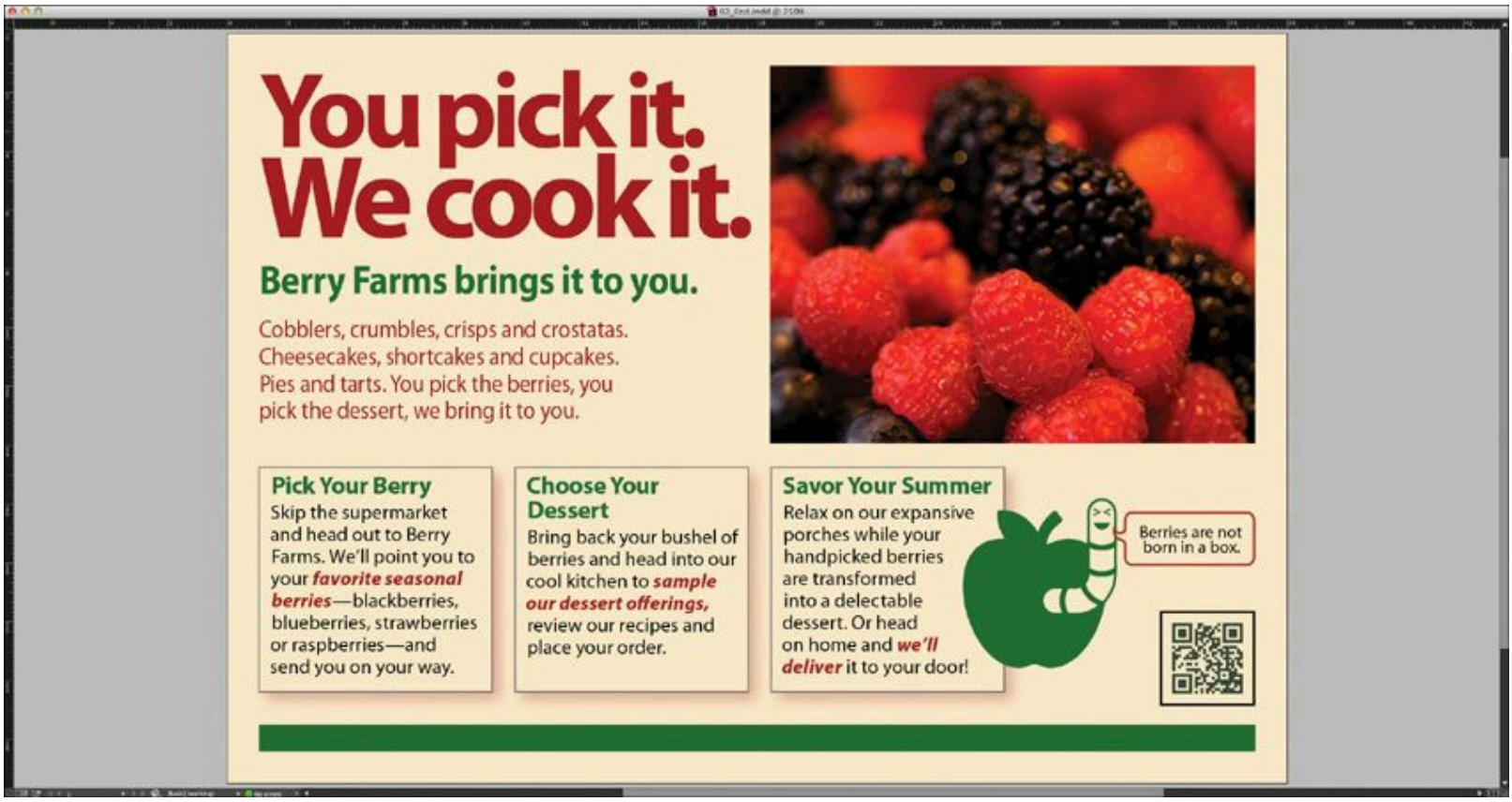
2. Start Adobe InDesign.

3. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced.
4. Choose File > Open, and open the 02_Start.indd file in the Lesson02 folder, located inside the Lessons folder within the InDesignCIB folder on your hard disk.
5. Choose File > Save As, rename the file **02_Postcard.indd**, and save it in the Lesson02 folder.
6. To display the document at a higher resolution, choose View > Display Performance > High Quality Display.
7. If you want to see what the finished document looks like, open the 02_End.indd file in the same folder. You can leave this document open to act as a guide as you work.



8. When you're ready to resume working on the lesson document, display it by clicking its tab in the upper-left corner of the document window.

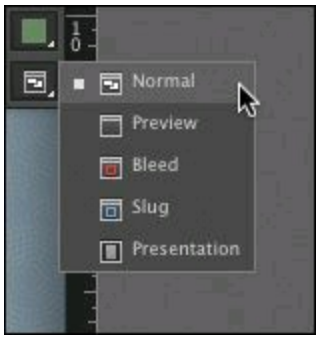
Viewing guides

Revising or completing an existing document, as you will do in this lesson, is very typical work for entry-level InDesign users. Currently, the postcard document is displayed in Preview mode, which displays artwork in a standard window, hiding nonprinting elements such as guides, grids, frame edges, and hidden characters. To work on this document, you will view guides and hidden characters (such as spaces and tabs). As you become comfortable working with InDesign, you will discover which view modes and layout aids work best for you.

Tip

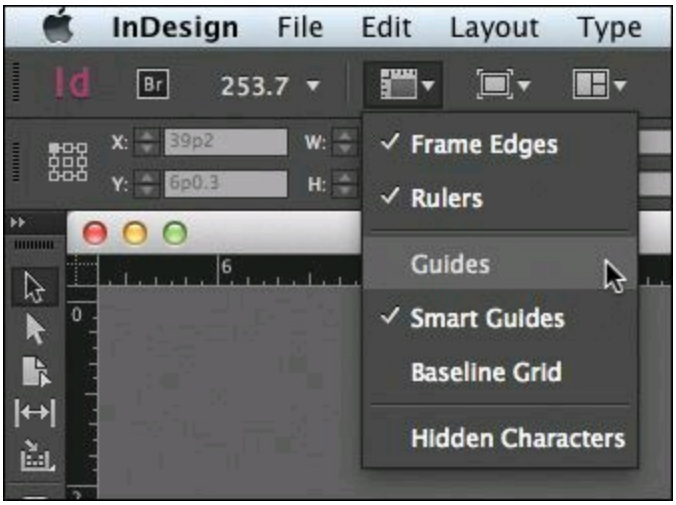
The other view modes are Bleed, for reviewing the predefined bleed area that extends beyond the page boundaries; Slug, for displaying the area outside the bleed area that can contain information such as printer instructions or job sign-off information; and Presentation, which fills the screen and works well for presenting design ideas to clients.

1. Click and hold down the Screen Mode button at the bottom of the Tools panel, and choose Normal ( ) from the menu.



Any layout aids that are enabled now display. For example, light blue, nonprinting lines now indicate existing text frames and objects because Frame Edges were displayed (View > Extras). You will now enable other layout aids.

2. In the Application bar, click the View Options menu ( ) and select Guides. Be sure Guides is checked in the menu.



When guides are displayed, it's easy to place text and objects with precision, including automatically snapping them into place. The guides do not print and do not limit the print or export area.

Tip

The commands in the Application bar are available in the main InDesign menus as well. These include View > Grids & Guides > Show Guides and Type > Show Hidden Characters.

---

3. From the same View Options menu, choose Hidden Characters.

Displaying hidden (nonprinting) characters, such as tabs, spaces, and paragraph returns, helps you precisely select and style text. In general, it's a good idea to show hidden characters whenever you are editing or formatting text.

4. As you work on this document, use the skills you learned in Lesson 1 to move panels, rearrange panels, scroll, and zoom as necessary.

Preflighting as you work

Anytime you start working on a document for the first time—whether you're creating a document from scratch or revising an existing document—you will need to keep an eye on output issues. You will learn more about all of these issues throughout the lessons in this book. Common issues include:

- Missing fonts: If a font used in the document is not present or enabled on your system, it is considered missing and the document will not print properly.
- Color models: Colors created in the wrong color model for the intended output device can cause problems. A common problem is that digital camera images often use the RGB color model while offset printing requires CMYK colors.
- Overset text: As text formatting changes and objects are moved and resized during layout, text can accidentally get cut off so it doesn't display or print. This is referred to as overset text.

In publishing, the process of reviewing a document for output issues is known as preflighting. InDesign provides a Live Preflight feature that lets you monitor documents as you're working to prevent potential problems from occurring. To customize Live Preflight, you can create or import production rules (called profiles) against which to check your documents. The default profile supplied with InDesign flags issues such as missing fonts and overset text (text that does not fit in its text frame). You will fix an overset text error in this exercise.

1. Choose Window > Output > Preflight to open the Preflight panel.

   Using the [Basic] (Working) preflight profile, InDesign finds one error, as indicated by the red Preflight icon (), which displays in the lower-left corner of the Preflight panel and the document window. According to the Error list in the Preflight panel, the problem is Text.

2. To view the error, click the arrow next to Text in the Preflight panel.

Tip

You can handle overset text in various ways, including revising the text in the Story Editor, reducing the font size, or expanding the text frame.

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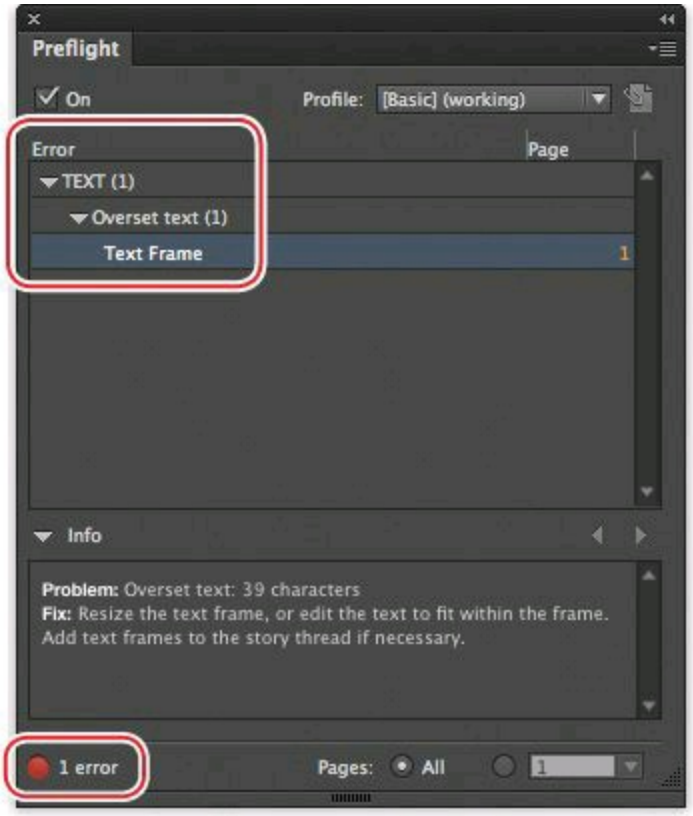
3. Click the arrow next to Overset Text, and then click Text Frame.
4. To display details for the error, click the arrow next to Info below.



5. Double-click Text Frame to select the problem text frame on the page, or click the page number link to the right in the Page column.

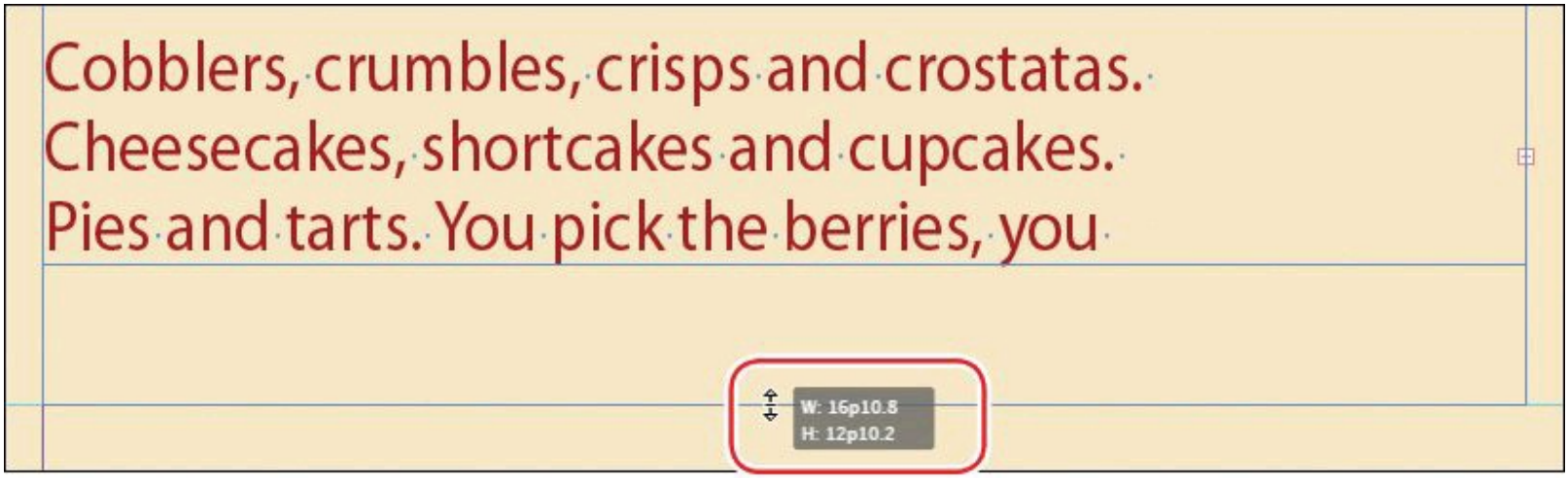
   The text frame containing the the headline, subhead, and body text is selected. The overset text is indicated by a red plus sign (+) in the frame's out port (the small square just above the lower-right corner of the frame).

Tip

By default, ruler guides are cyan (a blue-green color).

---

6. Using the Selection tool ( ), drag the handle at the bottom of the text frame down until it touches the ruler guide.



7. Click the pasteboard to deselect the text frame.
8. Choose View > Fit Page In Window.

Tip

Keep an eye on the lower-left corner of the document window to see if any errors arise. You can double-click the word "error" to open the Preflight panel for details on any errors.

InDesign now reports No Errors in the Preflight panel and the lower-left corner of the document window.

9. Close the Preflight panel. Choose File > Save to save your work.

Adding text

With InDesign, most text is contained by a text frame. (Text can also be contained in table cells and flow along paths.) You can type text directly into a text frame or import text files from word-processing programs. When importing text files, you can add the text to existing frames or create frames to contain the text. If text doesn't fit within the same frame, you can "thread," or link, the text frames.

Typing and styling text

You're ready to start working on the incomplete postcard. First, you'll type text in a text frame shaped like a "speech balloon." Then, you will format the text and adjust its placement within the frame.

Tip

Use the Type tool to edit text, format text, and create new text frames.

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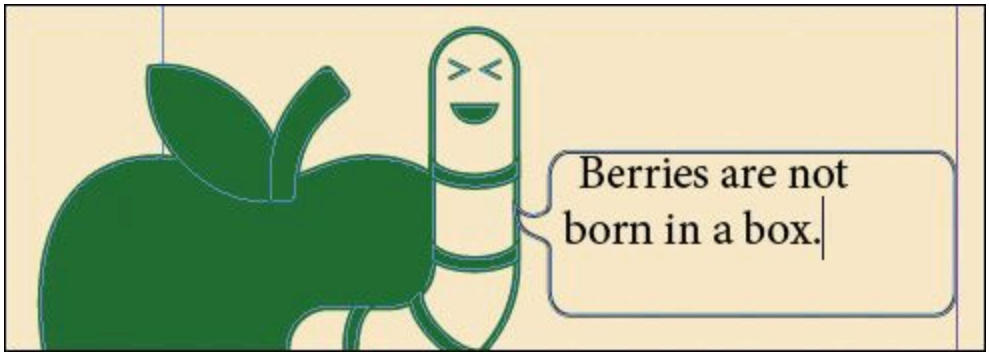
1. Select the Type tool (T), and click in the speech balloon at the right.
2. Type **Berries are not born in a box.** in the text frame.



3. With the insertion point still in the text, choose Edit > Select All.
4. If necessary, click the Character Formatting Controls icon (A) in the Control panel. Using the controls at the far left, do the following:
   - From the Font Family menu, select Myriad Pro.
   - From the Font Style menu, select Regular (if necessary).
   - Type **7** in the Font Size box to the right of the Font Family menu.
   - Type **6** in the Leading box under the Font Size box.

Tip

Alignments such as Center are paragraph formats, but they still display in the Control panel when Character Formatting Controls are displayed. Select Paragraph Formatting Controls to display paragraph formats more conveniently at left.

5. Toward the middle of the Control panel, click the Align Center button ( ).

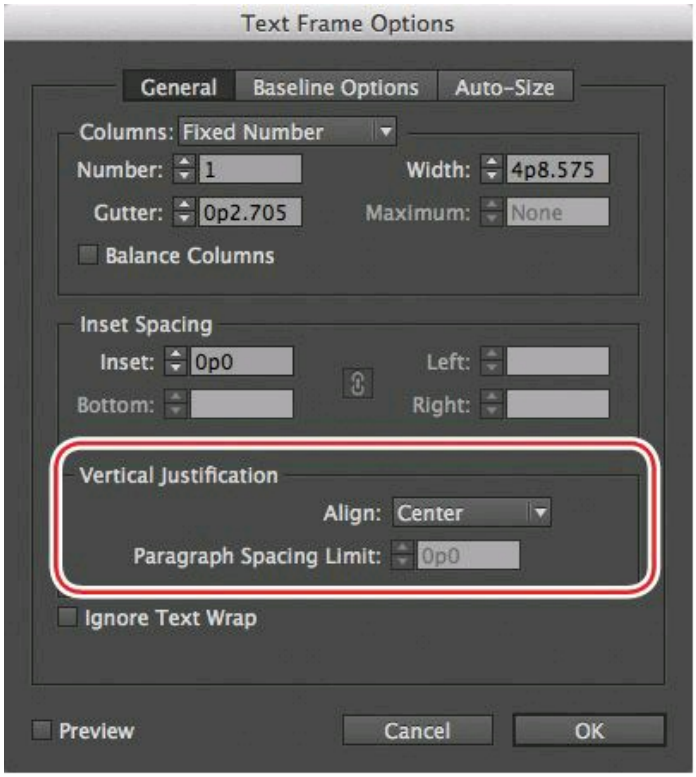
   You will now set an option for the text frame to control how the text is positioned vertically within the frame.

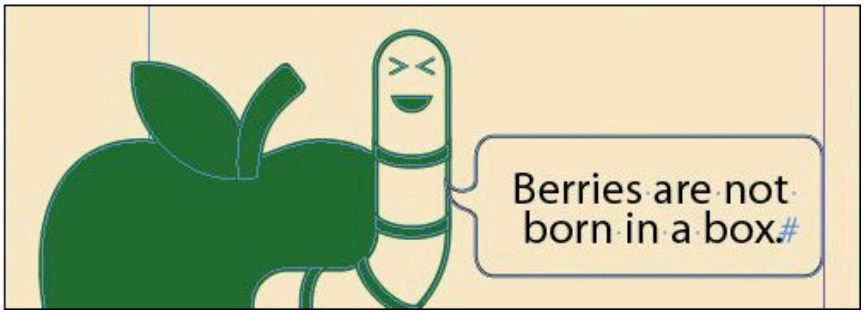
6. With the insertion point still in the text, choose Object > Text Frame Options. Select the General tab (if necessary).

7. In the Vertical Justification section, select Center from the Align menu.

   Note the location of the Columns and Inset Spacing features, which are helpful for positioning text within a frame as well. You will use these in later lessons.

8. Select the Preview box in the lower-left corner to see the change, and then click OK.





9. Choose File > Save to save your work.

Importing and flowing text

In most publishing workflows, writers and editors use word processors. When the text is almost final, they send the files to graphic designers. To complete the postcard, you will import a Microsoft Word file into a text frame at the bottom of the page using the Place command. You will then link the first text frame to the other two frames using a process called “threading.”

Tip

In many publishing environments, including marketing and advertising, the text is referred to as "copy," which is why the writers and editors are called "copywriters" and "copy editors."

---

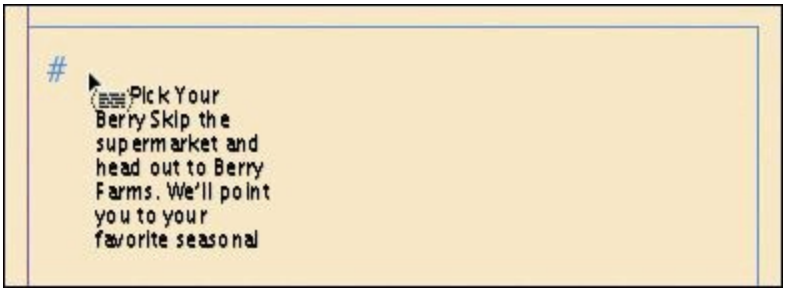
1. Make sure that no objects are selected by clicking a blank area of the pasteboard.
2. Choose File > Place. At the bottom of the Place dialog box, make sure that Show Import Options is not selected.
3. Navigate to the Lesson02 folder, in the Lessons folder, and double-click the BerryFarms.docx file.

Note

To see where to place the body copy text, consult the finished lesson document, 02_End.indd.

The pointer changes to a loaded text icon (). You'll add this text to the text frame in the lower-left quadrant of the postcard. (The text frames are outlined by light blue nonprinting lines.)

4. Position the loaded text icon in the upper-left corner of the text frame, then click.



The text in the Word file fills the frame, but it doesn't all fit. A red plus sign (+) in the out port of the frame indicates overset text. You will thread these text frames so the text flows through them.

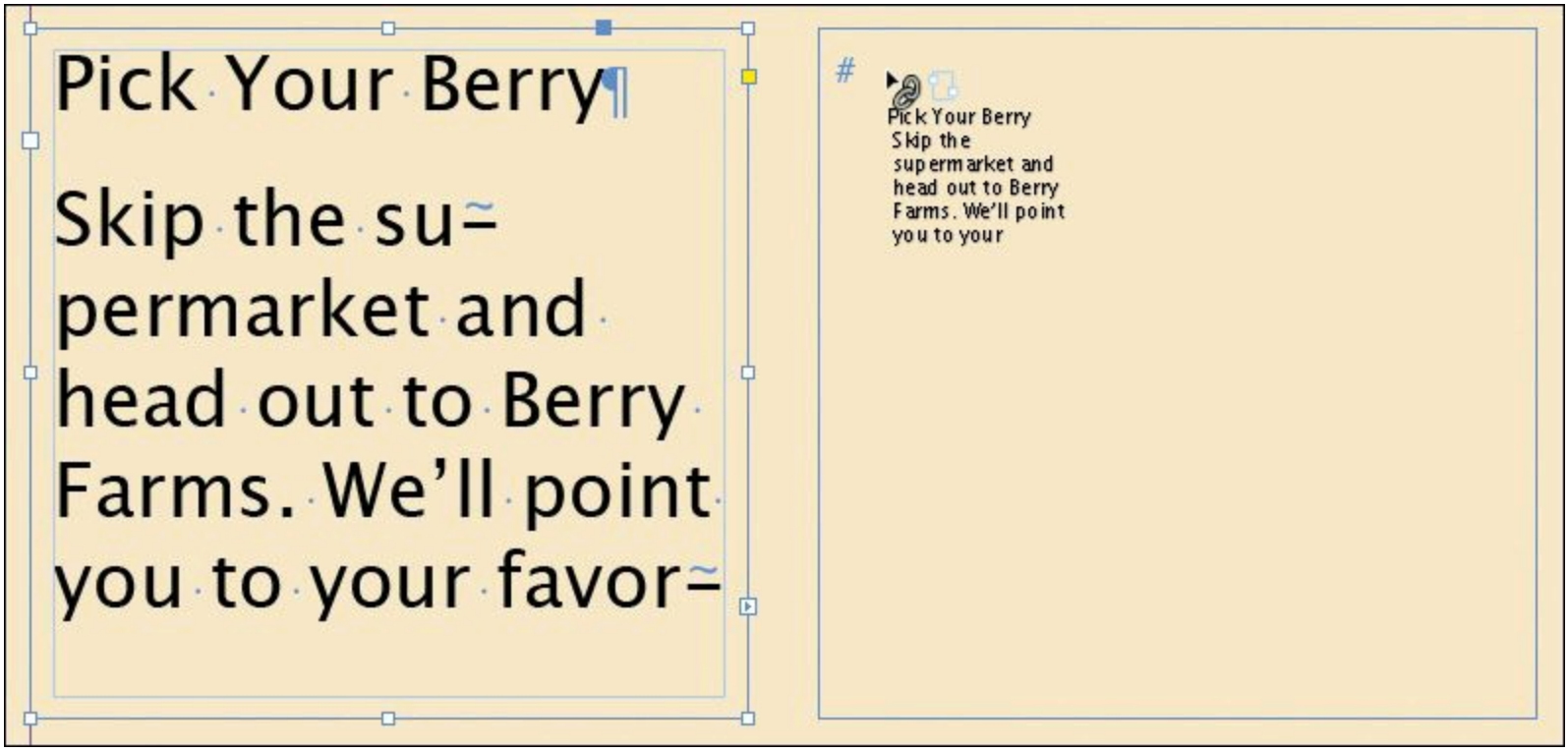
5. Using the Selection tool (), select the text frame that now contains the text.

Tip

When you have a loaded text icon, you have several choices: You can drag to create a new text frame, click inside an existing frame, or click to create a new text frame within the page's column guides.

---

6. Click the out port in the lower-right corner of the selected frame. The pointer becomes a loaded text icon. Click in the text frame immediately to the right.

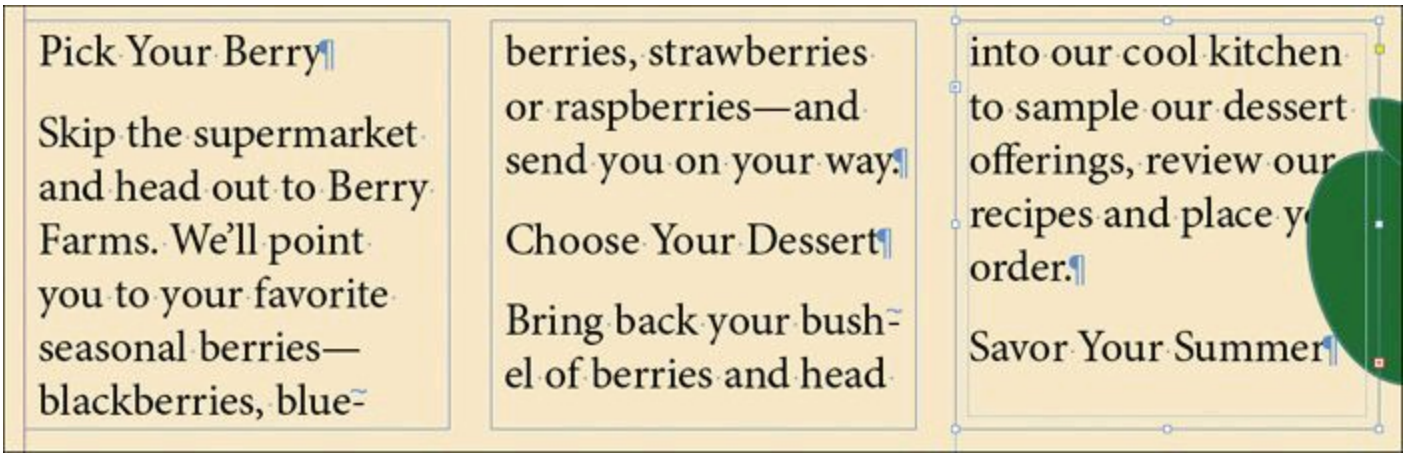


7. Once the text flows into the middle text frame, click that frame's out port. The pointer again becomes a loaded text icon. Click in the remaining text frame to finish threading the frames.

Note

Due to variations in font versions, you may see slightly different text in your frames.

At this point, text is still overset and the apple-shaped object is overlapping the text. You will resolve these problems by formatting the text with styles and wrapping the text around the apple shape later in this lesson.



8. Choose File > Save.

Working with styles

InDesign provides paragraph styles, character styles, and object styles for quickly and consistently formatting text and objects and—more important—easily making global changes by simply editing the style. Styles work as follows:

Tip

A paragraph style can include nested styles for the beginning of a paragraph and for lines within a paragraph. This automates common paragraph formatting, such as starting a paragraph with a drop cap followed by all capital letters on the first line.

- A paragraph style includes formatting attributes—such as indents—that apply to all the text in a paragraph. You can select a paragraph by simply clicking in it.
- A character style includes only character attributes—such as font and size—that apply only to selected text.
- An object style lets you apply formatting—such as fill and stroke color, stroke and corner effects, transparency, drop shadows, feathering, text frame options, and text wrap—to selected objects.

You will now format the text with paragraph and character styles.

Applying paragraph styles

Because the postcard is almost finished, all the paragraph styles you need are already created. You will first apply the Body Copy style to all the text in the three threaded text frames, and then you will apply the Subhead style to the box headings.

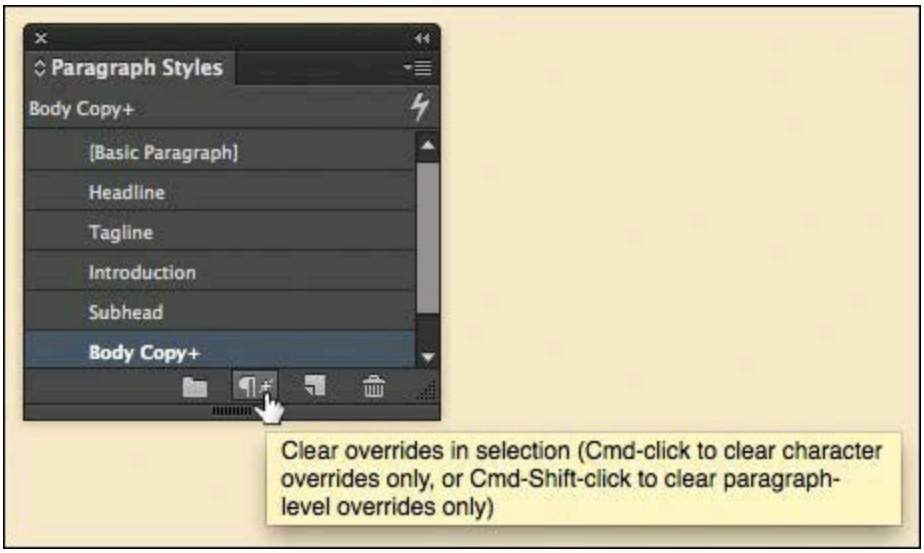
1. Using the Type tool (T), click in one of the three text frames containing the newly imported text.

Tip

All the text in a series of threaded text frames is called a story.

---

2. Choose Edit > Select All to select all the text in the threaded frames.
3. Choose Type > Paragraph Styles to display the Paragraph Styles panel.
4. In the Paragraph Styles panel, click the Body Copy style to format the entire story with the Body Copy style With the text still selected, click the Clear Overrides button at the bottom of the Paragraph Styles panel..



5. Click a blank area of the pasteboard to deselect all the text.
6. Using the Type tool, click in the first line of text in the story: “Pick Your Berry.”

As you can see from the hidden character (the paragraph return) at the end of the line, this line is actually its own paragraph. Therefore, it can be formatted with a paragraph style.

7. Click the Subhead style in the Paragraph Styles panel.
8. Apply the Subhead paragraph style to "Choose Your Dessert" and "Savor Your Summer" as well.

9. Choose File > Save.

Formatting text for the character style

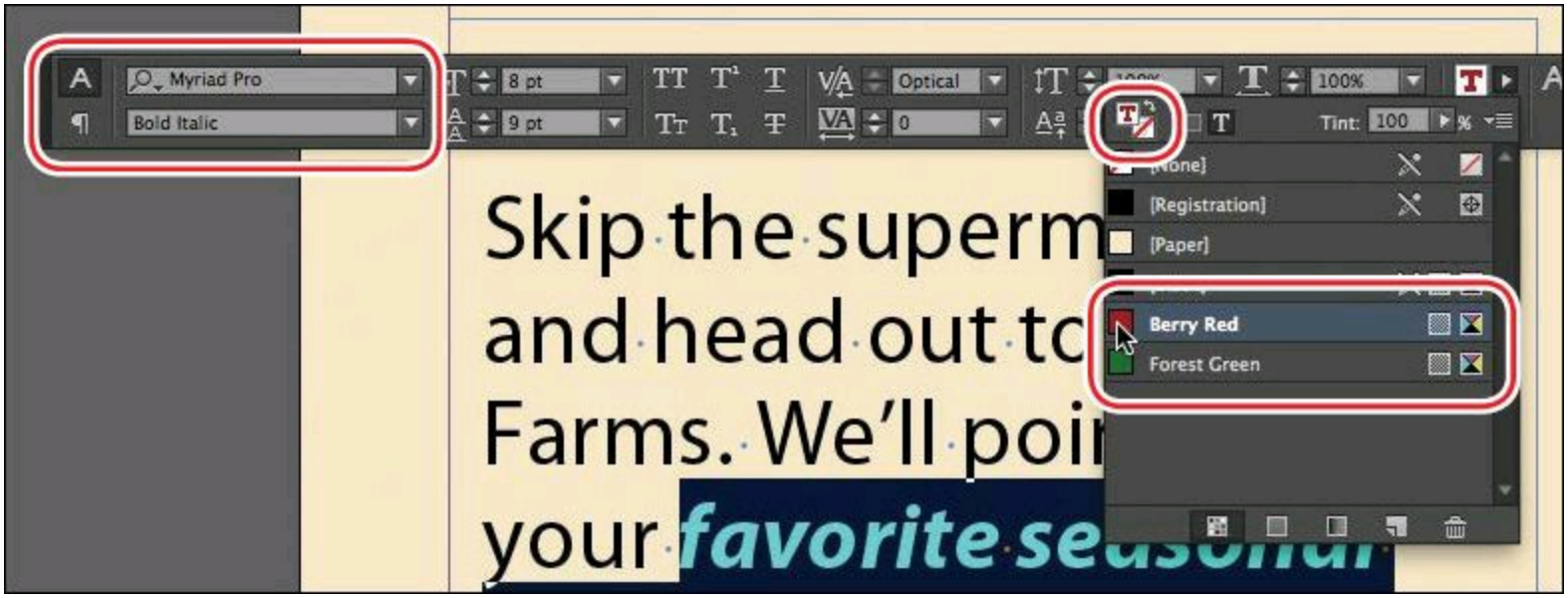
Highlighting a few key words in a paragraph can draw readers into the text. For the postcard copy, you will format a few words to make them "pop," and then create a character style based on those words. You can then quickly apply the character style to other selected words.

Tip

Remember that as you work, you can tear off panels, resize them, and move them to suit your needs. The configuration of your panels is largely dependent on the amount of screen space available. Many InDesign users have a second monitor for managing panels.

---

1. Using the Zoom tool (), zoom in on the first text frame in the lower-left quadrant of the postcard. This frame contains the head "Pick Your Berry."
2. Using the Type tool (), select the words "favorite seasonal berries" in the fourth line of the body copy.
3. Display the Type Style menu on the far left side of the Control panel. Select Bold Italic, leaving the font as Myriad Pro.
4. If necessary, click the Character Formatting Controls icon () in the Control panel. Click the arrow next to the Fill menu and choose Berry Red.

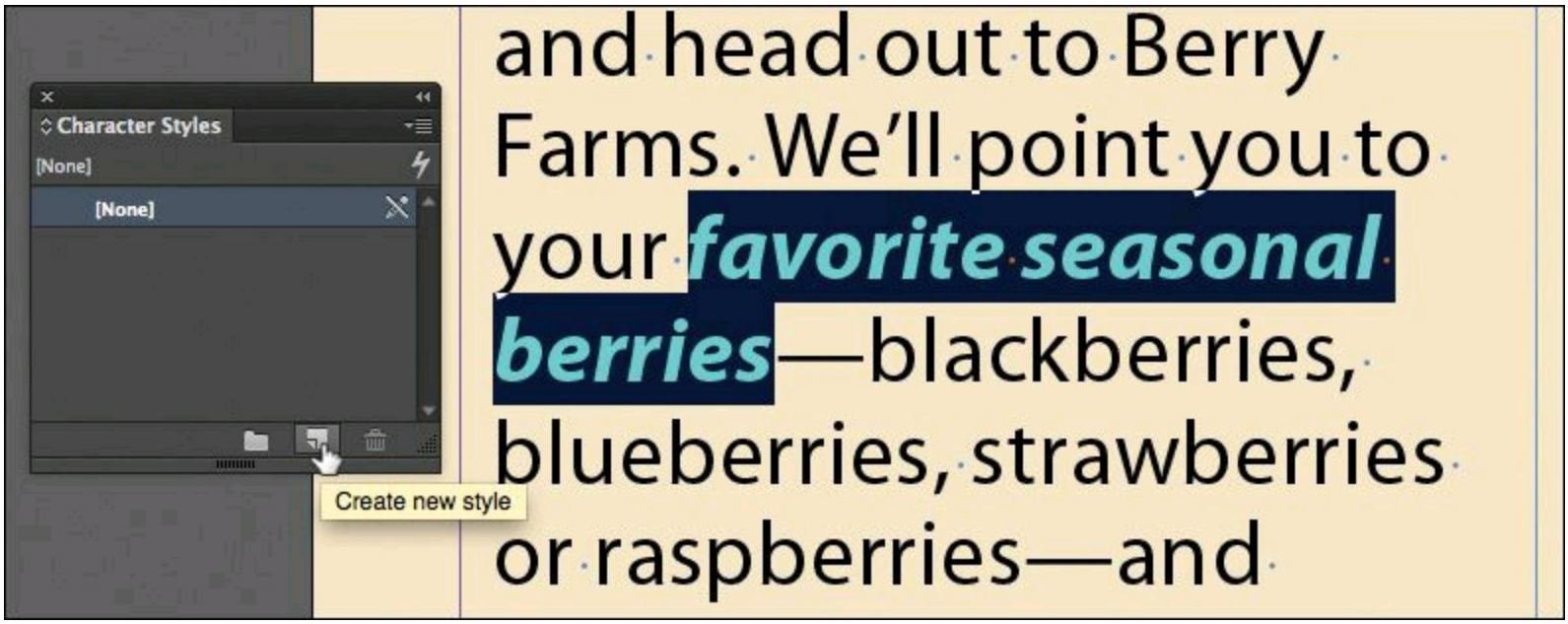


5. Click once to deselect the text and view your changes. Choose File > Save.

Creating and applying a character style

Now that you have formatted the text, you are ready to create a character style based on that formatting.

1. Using the Type tool ( ), select the words "favorite seasonal berries" again.
2. Choose Type > Character Styles to display the Character Styles panel.



Note

Pressing Alt (Windows) or Option (Mac OS) while you click the Create New Style button opens the New Character Style dialog box so you can immediately name the style. This feature works in the Paragraph Styles and Object Styles panels as well.

---

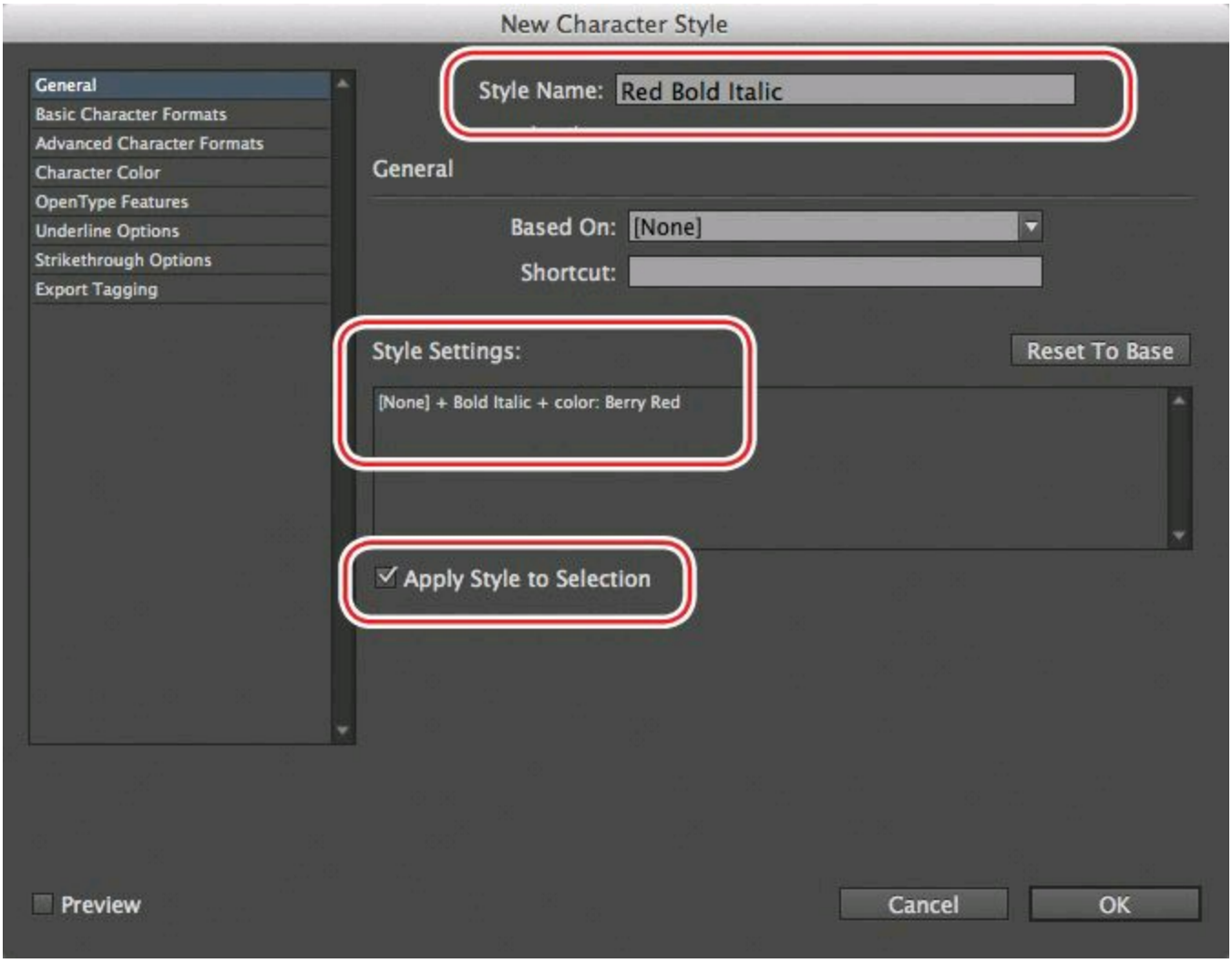
3. Hold down the Alt (Windows) or Option (Mac OS) key and click the Create New Style button, at the bottom of the Character Styles panel.

A new character style, named Character Style 1, is created in the New Character Style dialog

box. This new style includes the characteristics of the selected text, as indicated in the Style Settings area of the dialog box.

4. In the Style Name box, type **Red Bold Italic.**

5. At the bottom of the New Character Style dialog box, select Apply Style To Selection, and then click OK.



Tip

Typesetters often apply the same style to any punctuation following the styled word. This rule may vary based on design preferences or a publisher's style guide. The key is to be consistent.

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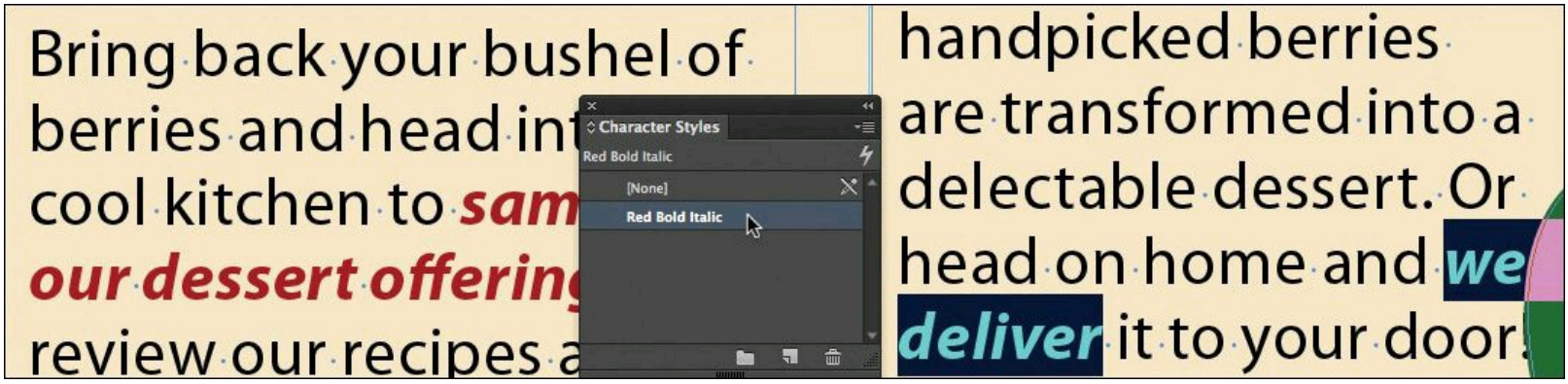
6. Using the Type tool, select the words "sample our dessert offerings" and the comma after "offerings" in the middle text frame. Click Red Bold Italic in the Character Styles panel.

   Because you applied a character style instead of a paragraph style, the formatting affected only the selected text, not the entire paragraph.

7. Using the Type tool, select the words "we'll deliver" in the text frame at the right. (You can drag to select the text even though part of it is obscured by the apple shape.) Click Red Bold Italic in the Character Styles panel.



8. Choose File > Save.

Working with graphics

To add the final design element to the postcard, you'll import, resize, and position a graphic. Graphics used in InDesign documents are placed inside frames. Use the Selection tool ( ) to resize the frame and to position the graphic within the frame. You will learn more about working with graphics in Lesson 10, "Importing and Modifying Graphics."

Tip

You can place a graphic into a selected frame or create a frame for the graphic. You can also drag graphic files from the desktop onto an InDesign page or pasteboard.

---

1. Choose View > Fit Page In Window.

   You will position the graphic in the upper-right quadrant of the postcard.

2. Make sure that no objects are selected by choosing Edit > Deselect All.

3. Choose File > Place. In the Place dialog box, make sure that Show Import Options is not selected.

4. Navigate to the Lesson02 folder in the Lessons folder, and double-click the Berries.psd file.

   The loaded graphics icon ( ) displays a preview of the graphic. If you click on the page, InDesign will create a graphics frame for you and place the graphic in it at full size. In this case, however, you will create a graphics frame to contain this graphic.

Note

To see where to place the graphic, consult the finished lesson document, 02_End.indd.

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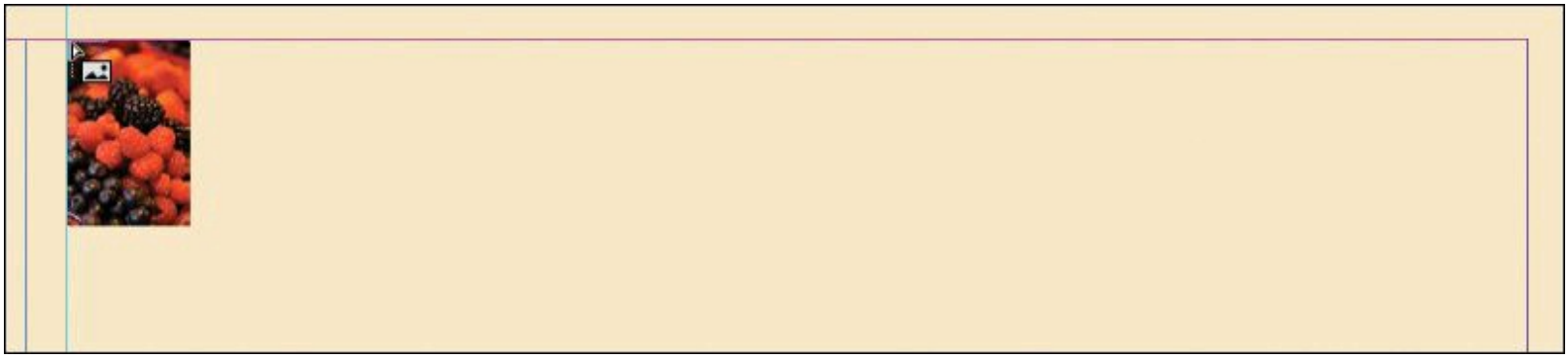
5. Position the loaded graphics icon at the intersection of the two guides in the upper-right quadrant of the postcard.



6. Drag down and to the right to create a frame that spans the column width. When you release the mouse button, a graphics frame is created. The length of the graphics frame is determined automatically by the graphic's proportions.

Tip

When you create a picture frame for a graphic, the graphic is automatically scaled to the frame. You can use the scaling controls on the Control panel to precisely adjust the graphic size. You will learn more about that in Lesson 10.

---

7. Using the Selection tool ( ), select the middle handle at the bottom of the graphics frame and drag it up. Align the bottom of the graphics frame with the bottom of the text frame to its left.

Use the Selection tool to crop a graphic by reducing the size of its frame.

Tip

To drag the graphic with more control, press the Shift key. This constrains the movement to horizontal, vertical, and 45 degree angles. If you click and pause briefly before resizing a frame with the Selection tool, or before moving the graphic within a frame, the part of the graphic that is cropped becomes visible outside the frame area.

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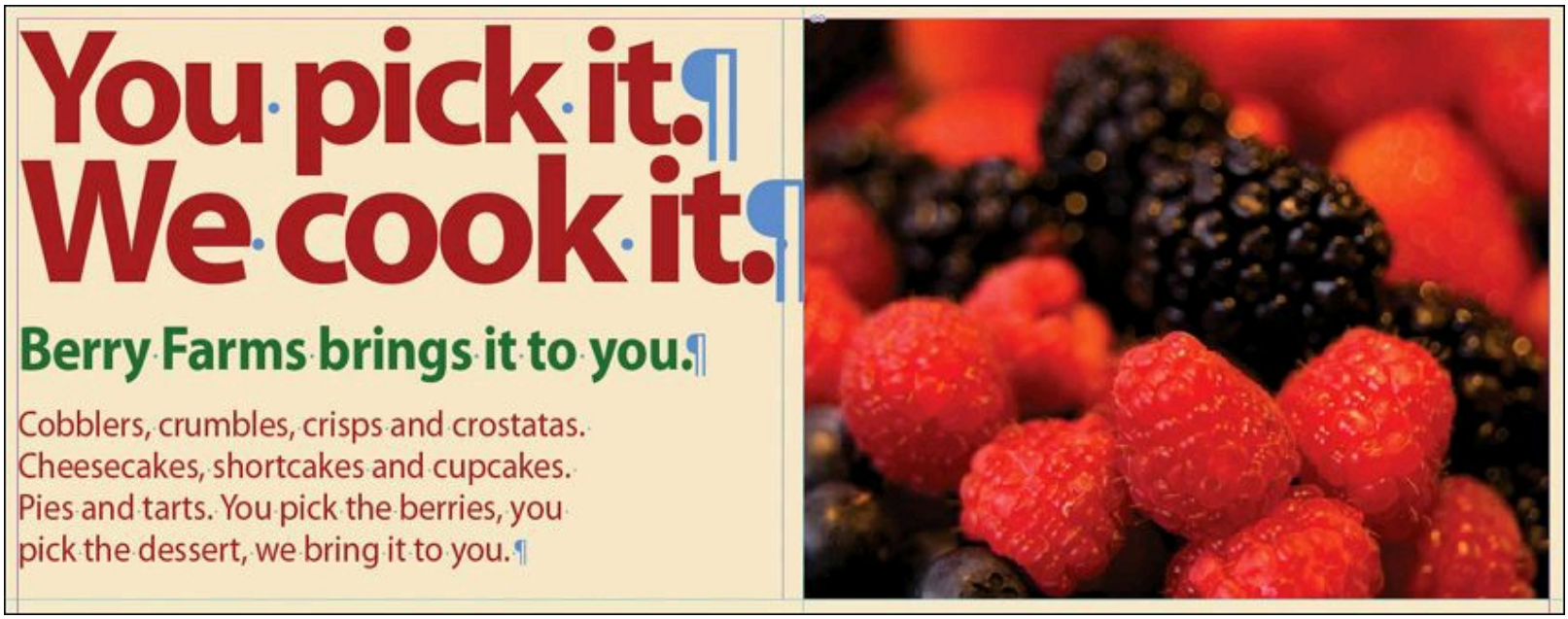
8. Still using the Selection tool, position the pointer over the graphic to display the content grabber, which looks like a doughnut. Click the content grabber to select the graphic, then drag up to position the berries within the frame as you please.

Drag the doughnut to reposition a graphic within its frame.

9. Choose File > Save.



Working with objects

The building blocks of InDesign pages are objects—text frames, graphics frames, rules (lines), tables, and more. In general, you move and resize objects with the Selection tool. Objects can have a fill color (background color), stroke weight (outline or frame thickness), and stroke color. You can move objects around freely, snap them to other objects, or place them with precision according to guides or values you enter. In addition, you can resize and scale objects and specify how text wraps around them. You will learn more about objects in Lesson 4, "Working with Objects." Here, you will experiment with a few object features.

Wrapping text around an object

To see text wrap in action, you will flow text around the apple shape in the lower-right quadrant of

the postcard.

1. Using the Zoom tool ( ), zoom in on the lower-right quadrant of the postcard.
2. Using the Selection tool ( ), click the apple shape, which is actually an InDesign object.
3. Choose Window > Text Wrap.

Tip

The Text Wrap panel has many options for controlling precisely how text wraps around objects and images.

---

4. In the Text Wrap panel, click the Wrap Around Object Shape button ( ).

5. Close the Text Wrap panel.
6. Choose File > Save.

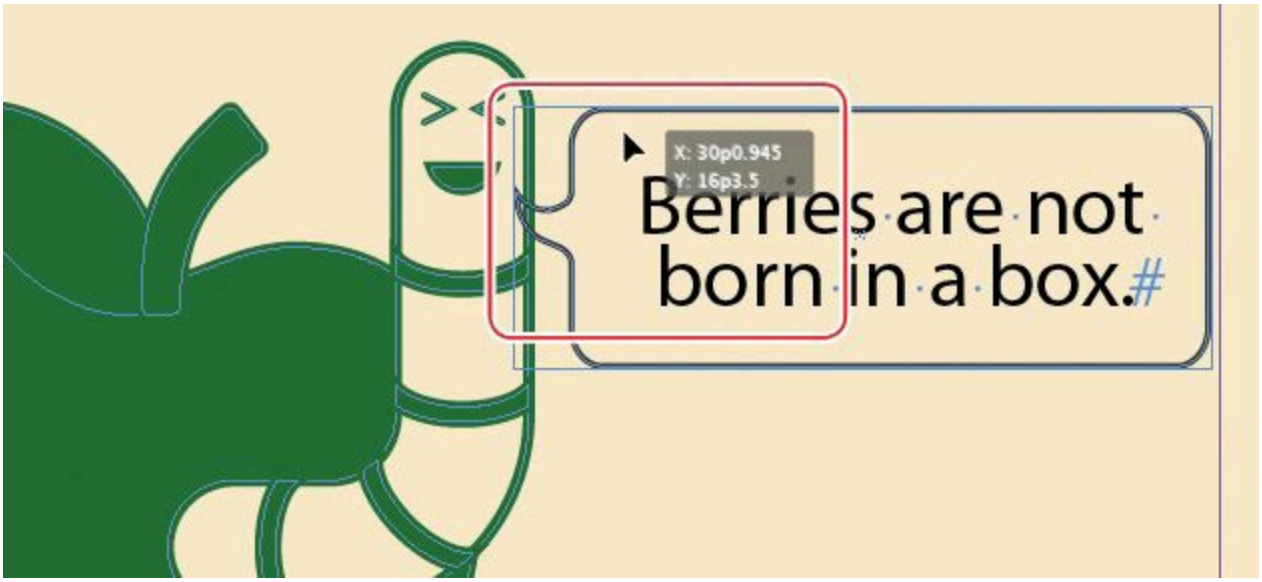
Moving an object and changing the stroke

When an object is selected with the Selection tool, you can drag it around to move it and you can change its formatting. Here, you will move the speech bubble at the bottom of the page so the words appear to be coming out of the worm's mouth. You will then change the stroke weight and color.

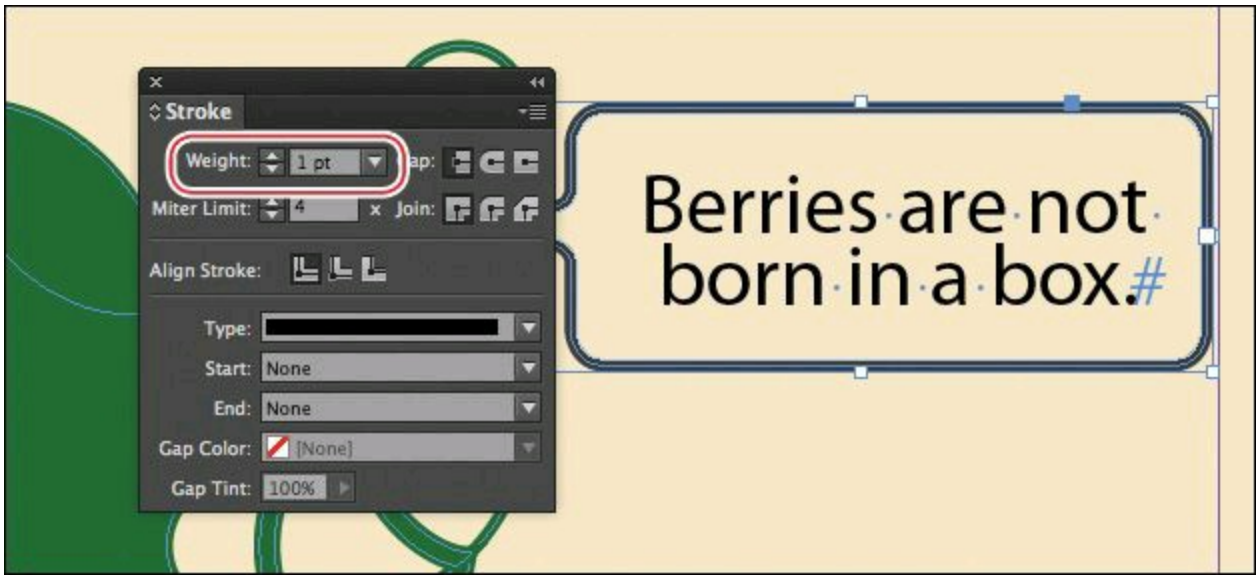
1. Using the Selection tool ( ), select the speech bubble text frame.
2. Point at the text frame to display the mover pointer ( ), and then drag the frame up to the worm's mouth as shown. The precise placement doesn't matter.

Tip

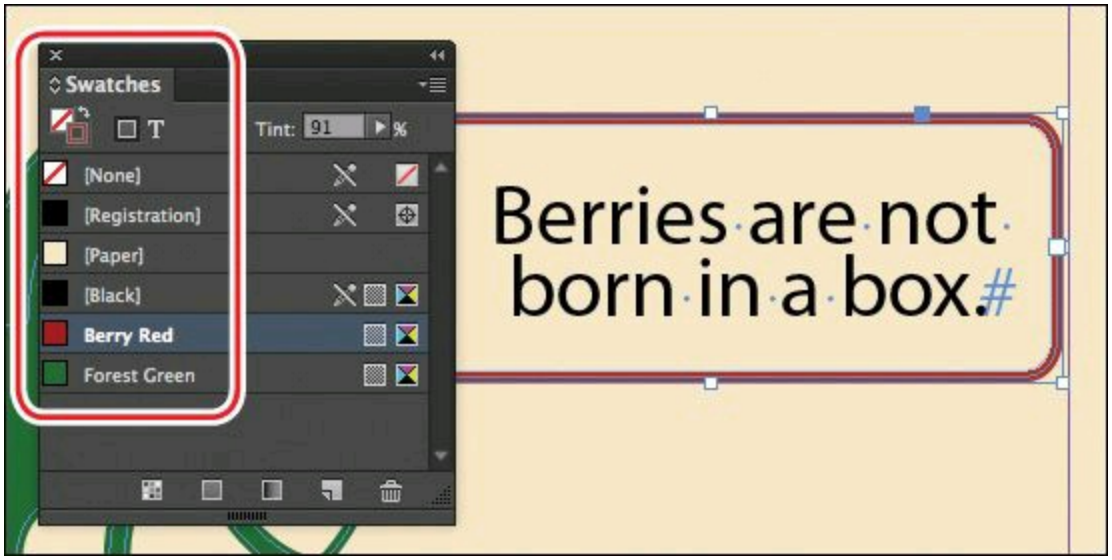
InDesign provides many options for moving selected objects, including dragging them, "nudging" them with the arrow keys, and entering precise placement values in the X and Y fields on the Control panel.



3. With the text frame still selected, click the Stroke panel icon at the right. In the Stroke panel, choose 1 pt from the Weight menu.



4. With the text frame still selected, click the Swatches panel icon at the right.
5. Click the Stroke box ( ) at the top of the panel to indicate that you want to apply color to the text frame's border.
6. Select Berry Red.

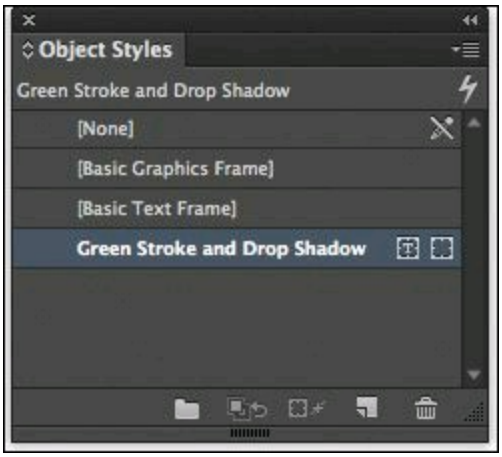


7. Click the pasteboard to deselect all objects.
8. Choose File > Save.

Working with object styles

As with paragraph and character styles, you can quickly and consistently format objects by saving attributes as styles. In this exercise, you will apply an existing object style to the three threaded text frames containing the body copy.

1. Choose View > Fit Page In Window.
2. Choose Window > Styles > Object Styles to display the Object Styles panel.
3. Using the Selection tool ( ), click the text frame at left containing the "Pick Your Berry" subhead.
4. Click the Green Stroke And Drop Shadow style in the Object Styles panel.



5. Press the Shift key while you click the remaining two text frames, which contain the "Choose Your Dessert" and "Savor Your Summer" subheads.
6. Click the Green Stroke And Drop Shadow style in the Object Styles panel.
7. Choose File > Save.

Viewing the document in Presentation mode

In Presentation mode, the InDesign interface is hidden entirely, and the document fills the whole screen. This mode works well for presenting design ideas to clients on a laptop.

Tip

You cannot edit documents in Presentation mode, but you can make changes in any other screen mode.

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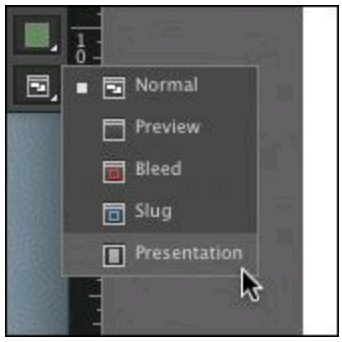
1. Click and hold down the Screen Mode button at the bottom of the Tools panel, and select Presentation ( ).



2. After viewing the document, press Esc (Escape) to exit Presentation mode. The document displays in its previous mode, Normal.
3. To view the document without layout aids, select Preview from the Screen Mode menu on the Application bar.

4. Choose View > Actual Size to see the document at its output size.

5. Choose File > Save.

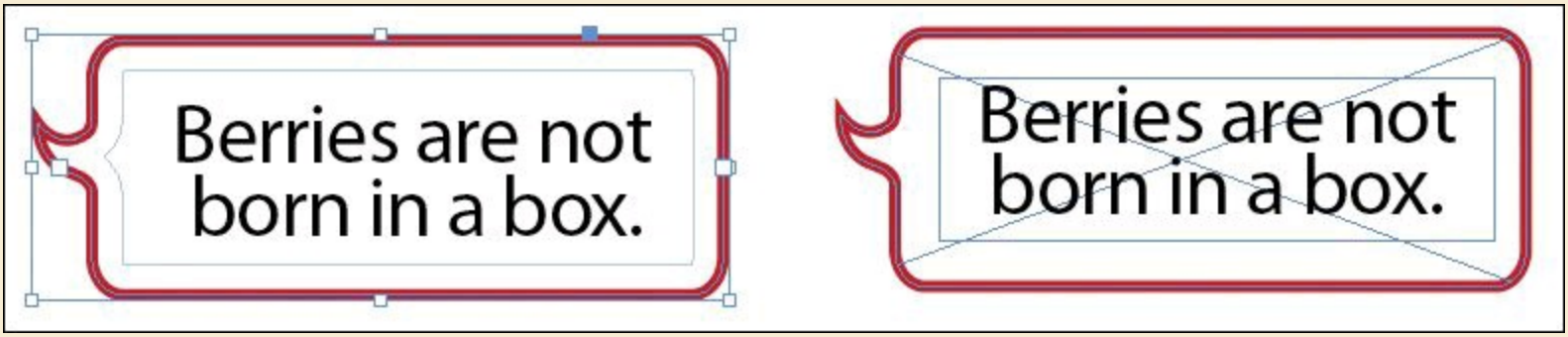
Congratulations! You've completed the InDesign tour.

InDesign best practices

While completing the postcard in this lesson, you experimented with the basic building blocks of a document and the best practices for creating a document. When you create a document following best practices, the document is easy to format, revise, and replicate consistently. Some of these techniques include:

- **Start with preflight.** As soon as you receive a document to work on, use the Live Preflight feature to make sure the document will output correctly. For example, if the document is missing a font, you will need to acquire that font right away before you continue working on the document.
- **Avoid layering objects.** Format one object rather than layering objects. For example, the three text frames containing the postcard's body text have a text inset, stroke weight, stroke color, and drop shadow applied. An inexperienced InDesign user might be tempted to create this look by layering multiple frames. Using multiple objects creates extra work when moving and aligning objects or changing the formatting.
- **Thread text frames.** Inexperienced users are often tempted to place or paste text into separate, freestanding text frames. The text in these frames needs to be selected and formatted individually. If you flow the text through threaded frames, it remains as a single body of text called a story. Among other benefits of working with a story as opposed to disjointed frames of text, you can select all the text in a story for formatting and limit the use of Find/Change to the text in a story. When working on a longer document, such as a book, threading text frames is crucial to controlling the text placement and entering revisions.
- **Use styles for all formatting.** InDesign provides styles for formatting objects, paragraphs, lines within paragraphs, characters, tables, and table cells. With styles, you can quickly and consistently format everything in a document. In addition, if you make a change to a format, all you need to do is change the style. For example, in the postcard, if you wanted to change the font used in the body copy, all you would need to do is edit the Character Formats of the Body Text paragraph style. Styles can easily be updated to reflect new formatting and can be shared among documents as well.

You will learn more about all of these features as you work through the lessons.



The best-practices text frame, at left, is shaped like a speech bubble. Text Inset and Vertical Justification options control how the text sits within the frame. The text frame can be moved, resized, and formatted as a single object. At right, a graphics frame is shaped like a speech

bubble and a text frame is placed on top of it. The two frames are grouped so they can be moved together, but groups can be more complex to format and change.

Exploring on your own

To learn more about InDesign, you may want to try the following within the postcard layout:

- Change the text formatting with options in the Control panel or the Paragraph and Character panels (Type menu).
- Apply different paragraph and character styles to text.
- Move and resize objects and graphics.
- Apply different object styles to objects.
- Try out the various Text Wrap options.
- Double-click a paragraph, character, or object style and change its formatting. Notice how the change affects the text or objects to which the style is applied.
- Choose Help > InDesign Help to explore the help system.
- Go through the lessons in the rest of this book.

Review questions

1. How can you tell if an aspect of a layout will cause output problems?
2. What tool allows you to create text frames?
3. What tool allows you to thread text frames?
4. What symbol indicates that a text frame has more text than it can hold—that is, overset text?
5. What tool allows you to move both frames and graphics within frames?
6. What panel provides options for modifying selected frames, graphics, and text?

Review answers

1. The Preflight panel reports errors when something in the layout does not comply with the selected preflight profile. For example, if the preflight profile specifies CMYK output and you import an RGB graphic, an error is reported. Preflight errors are also reported in the lower-left corner of the document window.
2. You create text frames with the Type tool.
3. You thread text frames with the Selection tool.
4. A red plus sign in the lower-right corner of a text frame indicates overset text.
5. The Selection tool lets you drag a frame to move it or move a graphic around within a frame.
6. The Control panel provides options for modifying the current selection: characters, paragraphs, graphics, frames, tables, and more.

3. Setting Up a Document and Working with Pages

Lesson Overview

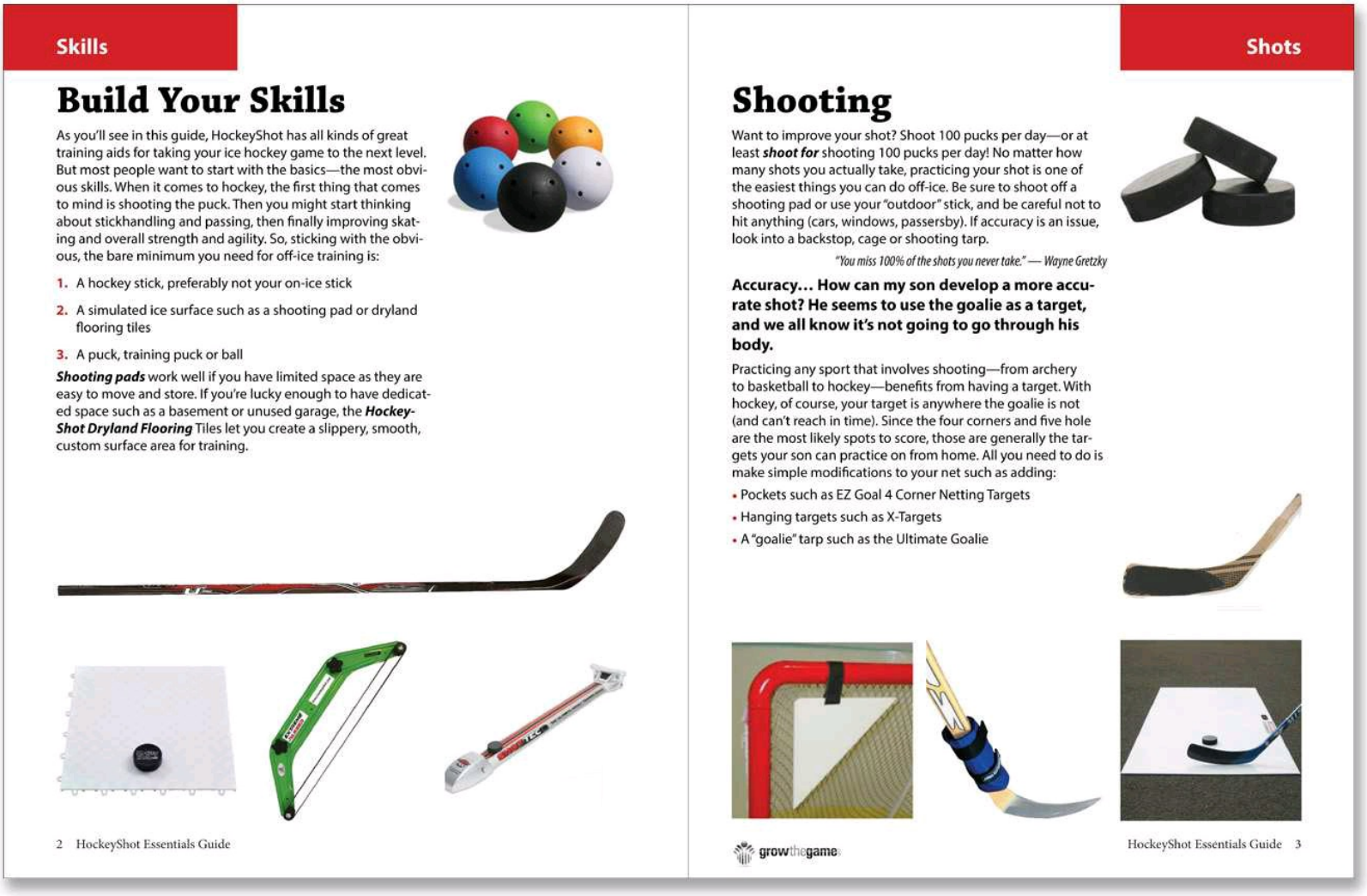
In this lesson, you'll learn how to do the following:

- Save custom document settings as a document preset.
- Create a new document and set document defaults.
- Lay out a master page.
- Create an additional master page.
- Apply a master page to document pages.
- Add pages to a document.
- Rearrange and delete pages.
- Change the size of pages.
- Create section markers and specify page numbering.
- Lay out document pages.
- Rotate a document page.

This lesson will take approximately 90 minutes.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the Getting Started section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.



By taking advantage of the features that help you set up the documents you create, you can ensure consistent page layout and simplify your work. In this lesson, you'll learn how to specify settings for a new document, design master pages, and work with document pages.

Getting started

In this lesson, you'll set up an eight-page newsletter with a four-page insert, and then place text and graphics on one of the document's facing-page spreads.

1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

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2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced. To begin working, you'll open an InDesign document that is already partially completed.

3. To see what the finished document looks like, open the 03_End.indd file, in the Lesson03 folder, located inside the Lessons folder within the InDesign CIB folder on your hard drive. (If the Adobe Typekit dialog box displays, click Sync Fonts.) The graphic below shows one of the document's facing-page spreads.

4. Scroll through the document to view other pages. To see the guidelines and placeholder frames on the pages, choose View > Screen Mode > Normal. Navigate back to pages 2–3, which are the only document pages you'll lay out in this lesson. You will also lay out a pair of master page spreads.

Note

As you work, feel free to move panels or change the magnification of the document to meet your needs.

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5. Close the 03_End.indd file after you have finished examining it, or you can leave this document open for reference.

Creating and saving custom document settings

InDesign lets you save frequently used document settings, including the number of pages, page size, columns, and margins. Choosing one of these saved document parameters, called document presets, when you create a new document saves time and ensures consistency.

1. Choose File > Document Presets > Define.

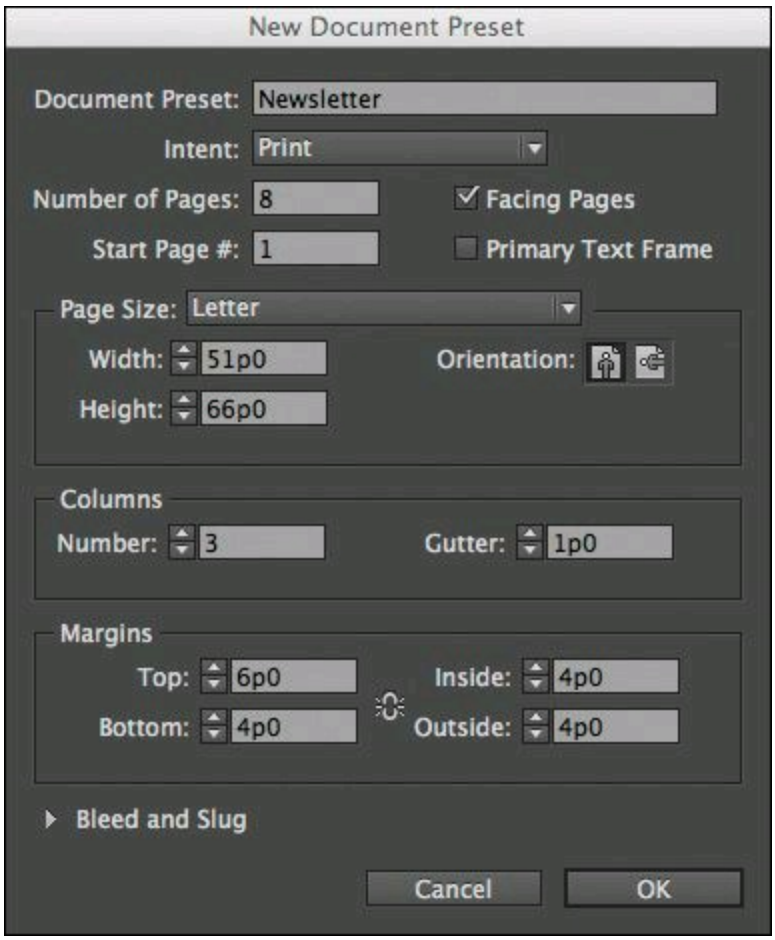
2. Click New in the Document Presets dialog box.

Tip

You can use any supported unit of measurement in any dialog box or panel. If you want to use a measurement unit that differs from the default, simply type the indicator for the unit you want to use, such as **p** for picas, **pt** for points, **cm** for centimeters, **mm** for millimeters, and either **in** or **″** (inch marks) for inches, after the value you enter into a box. You can change the default units by choosing Edit > Preferences > Units & Increments (Windows) or InDesign > Preferences > Units & Increments (Mac OS).

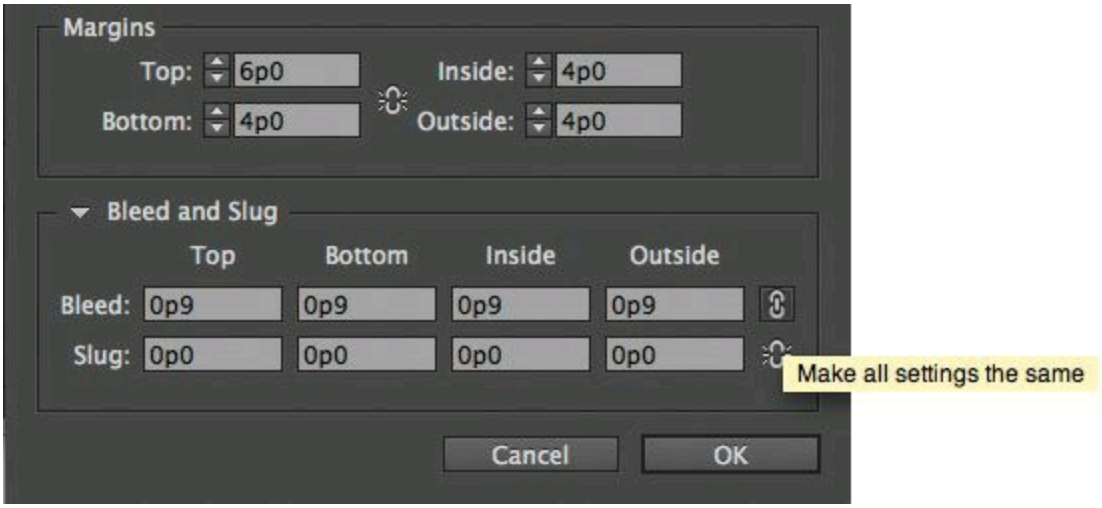
---

3. In the New Document Preset dialog box, set the following:
   - In the Document Preset box, type **Newsletter**.
   - In the Number of Pages box, type **8**.
   - Make sure that the Facing Pages option is selected.
   - Use the default Page Size (Letter).
   - In the Columns section, type **3** for Number, and leave the Gutter at 1p0.
   - In the Margins section, make sure that the Make All Settings The Same icon in the center of the margin settings is deselected ( ) so that you can enter settings that aren't the same for all four margins. Type **6p** for Top; type **4p** for the Bottom, Inside, and Outside margins.



4. Click the small triangle to the left of Bleed And Slug to display additional controls. Type **.125 in** the Top box of the Bleed option. Then ensure that the Make All Settings The Same icon is selected (unbroken), so that the same value is used for the Bottom, Inside, and Outside boxes.

Click inside the Bottom box and notice that InDesign automatically converts measurements expressed using other measurement units (in this case, inches) to the pica and point equivalents. (The default Bleed value is 0p9, or one-eight of an inch.)



The bleed values specify an area outside the perimeter of each page that can be printed and is used to print design elements, such as pictures or a colored background, that extend to the edge of the page. The bleed area is trimmed and discarded after the printing process.

5. Click OK in both dialog boxes to save the document preset.

Tip

In the New Document dialog box, the default setting of 1 in the Start Page # box starts the document on a recto (right) page. That is, the first page of the document is to the right of the spine. You can begin a document on a verso page by entering an even value (for example, 2, 4, 8, and so on) in the Start Page # box. The value you enter in this box is assigned to the first page in the document.

Creating a new document

Each time you create a new document, the New Document dialog box lets you choose a document preset as the starting point, or you can use this dialog box to specify several document settings, including the number of pages, the page size, the number of columns, and more. In this section, you'll use the Newsletter preset that you just created.

1. Choose File > New > Document.
2. In the New Document dialog box, choose the Newsletter preset from the Document Preset menu if it isn't already selected. Select Preview to see a preview of the document in the document window.
3. Click OK.

   InDesign creates a new document using all of the specifications from the document preset, including the page size, margins, columns, and number of pages.
4. Open the Pages panel by clicking its panel icon or choosing Window > Pages. If necessary, drag the bottom of the panel downward until all document page icons are visible.

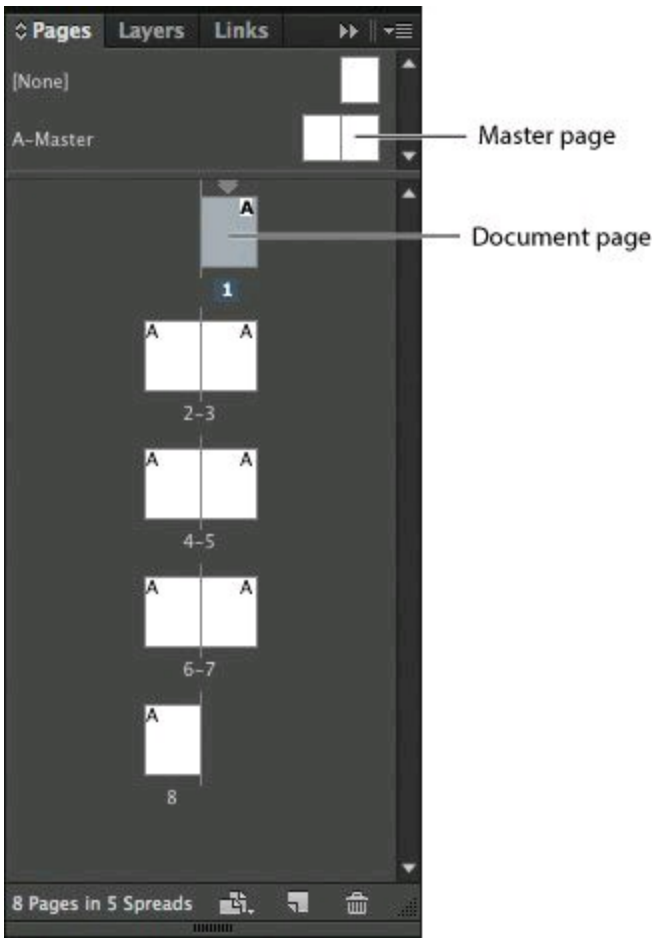
Tip

You can also create a new document based on a document preset by choosing File > Document Presets > [Preset_Name]. If you press the Shift key when selecting a preset, the New Document dialog box isn't displayed.

In the Pages panel, the icon for page 1 is highlighted in gray and the page number below the icon is displayed within a blue rectangle to indicate that page 1 is currently displayed in the document window.

The Pages panel is divided into two sections by a horizontal line. The top section displays thumbnails of the document's master pages. A master page is like a background template that you can apply to any of the pages in a document. Master pages contain elements such as headers, footers, and page numbers that appear on all document pages. The lower section of the pages panel displays thumbnails document pages.

In this document, the default master page (which is given the default name "A-Master") consists of a two-page spread of facing pages.



5. Choose File > Save As, name the file **03_Setup.indd**, navigate to the Lesson03 folder, and click Save.

Switching between open InDesign documents

As you work, you may want to switch between your new document and the supplied finished document for reference. If both documents are open, you can bring one or the other to the front.

Tip

The keyboard shortcut for switching among open InDesign documents is Ctrl+`

(Windows) or Command+` (Mac OS). (The ` character is located above the Tab key.)

---

1. Choose the Window menu. A list of currently open InDesign documents is displayed at the bottom.
2. Choose the document you want to view. That document now appears in front. Choose the 03_Setup.indd document when you're ready to continue.

The names of all open documents are also displayed along the top of the document window, starting on the left with the first document opened. Clicking a document's name displays that document.

Working with master pages

Before you add graphics and text frames to a document, you may want to set up the master pages, which serve as backgrounds for your document pages. Any object that you add to a master page automatically appears on the document pages to which the master page has been applied.

In this document, you'll create two master page spreads—one containing a grid of guidelines and footer information, and a second containing placeholder frames. By creating multiple master pages, you allow for variation while ensuring consistent design.

Adding guides to the master page

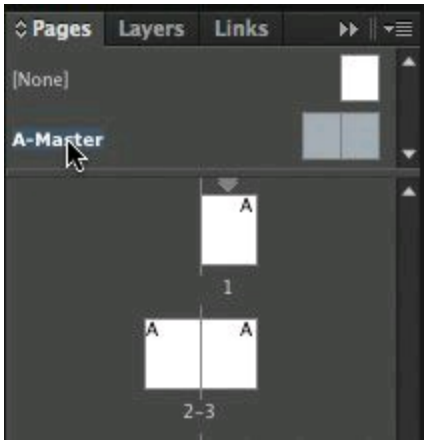
Guides are nonprinting lines that help you lay out a document precisely. Guides placed on a master page appear on any document pages to which that master is applied. For this document, you'll add several guides that, along with the existing column guides, act as a grid to help you position graphics frames, text frames, and other objects.

Tip

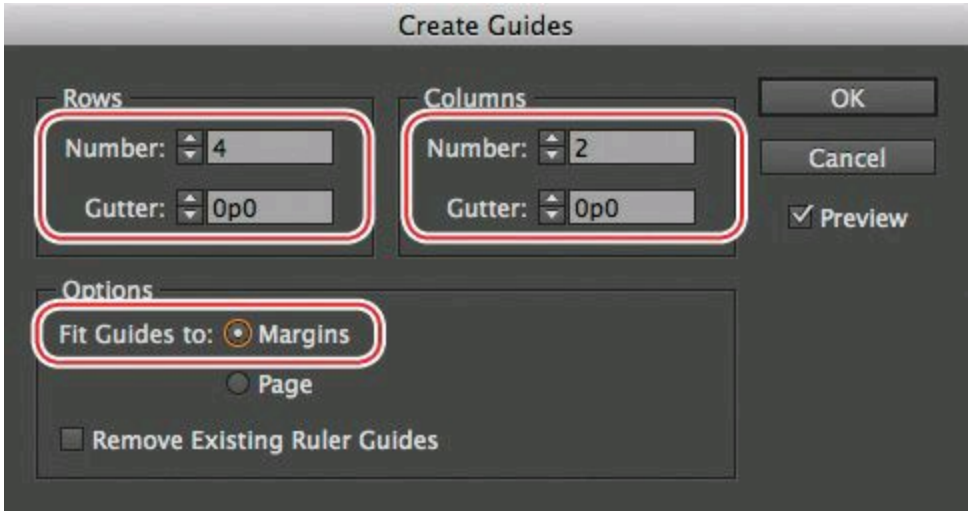
If the two pages of the master page spread are not centered in the document window, double-click the Hand tool in the Tools panel to center them.

---

1. In the upper section of the Pages panel, double-click the name A-Master. The master spread's left and right pages are displayed in the document window.



2. Choose View > Fit Spread In Window to display both pages of the master spread.
3. Choose Layout > Create Guides.
4. Select Preview to display your changes as you make them.
5. For the Rows option, type **4** in the Number box and **0** in the Gutter box.
6. For the Columns option, type **2** in the Number box and **0** in the Gutter box.
7. For Fit Guides To, select Margins and notice how the horizontal guides appear on your master pages.



Tip

Guides can also be added to a spread in a facing-page document by using the Create Guides command (Layout menu) when working on a document page rather than a master page.

Selecting Margins instead of Page causes the guides to fit within the margin boundaries rather than the page boundaries. You don't need to add column guides because they are already displayed in your document based on the settings in the document preset.

8. Click OK.

Dragging guides from rulers

You can drag guides from the horizontal (top) and vertical (left side) rulers at the edge of the document window to provide additional alignment assistance on individual pages. Pressing Ctrl (Windows) or Command (Mac OS) while dragging a guide applies the guide to the entire spread.

Pressing Alt (Windows) or Option (Mac OS) while dragging a guide from the horizontal ruler changes it to a vertical guide and changes a vertical guide to a horizontal guide when dragging a guide from the vertical ruler.

In this lesson, you will place headers above the top margin of the page and footers below the bottom margin in areas where there are no column guides. To position the headers and footers accurately, you will manually add two horizontal guides and two vertical guides.

Tip

You can also drag a ruler guide without the Ctrl or Command key and release the guide over the pasteboard to have a guide appear across all pages in a spread as well as on the pasteboard.

---

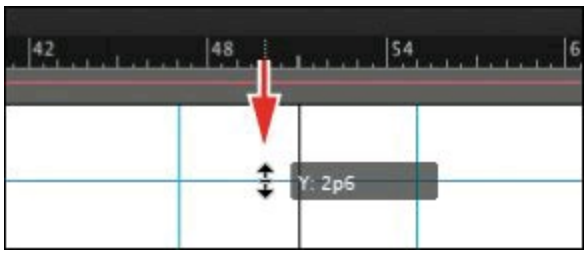
1. If it's not already selected, double-click the name A-Master in the Pages panel. If the A-Master spread is not visible in the top section of the Pages panel, you may need to scroll within the top section of the panel to view it. If you want, you can drag the horizontal divider bar between the master page icons and document page icons downward to view the master page icons without having to scroll.

Note

The controls in the Transform panel are similar to those in the Control panel. You can use either panel to make many common modifications, such as changing position, size, scale, and angle of rotation.

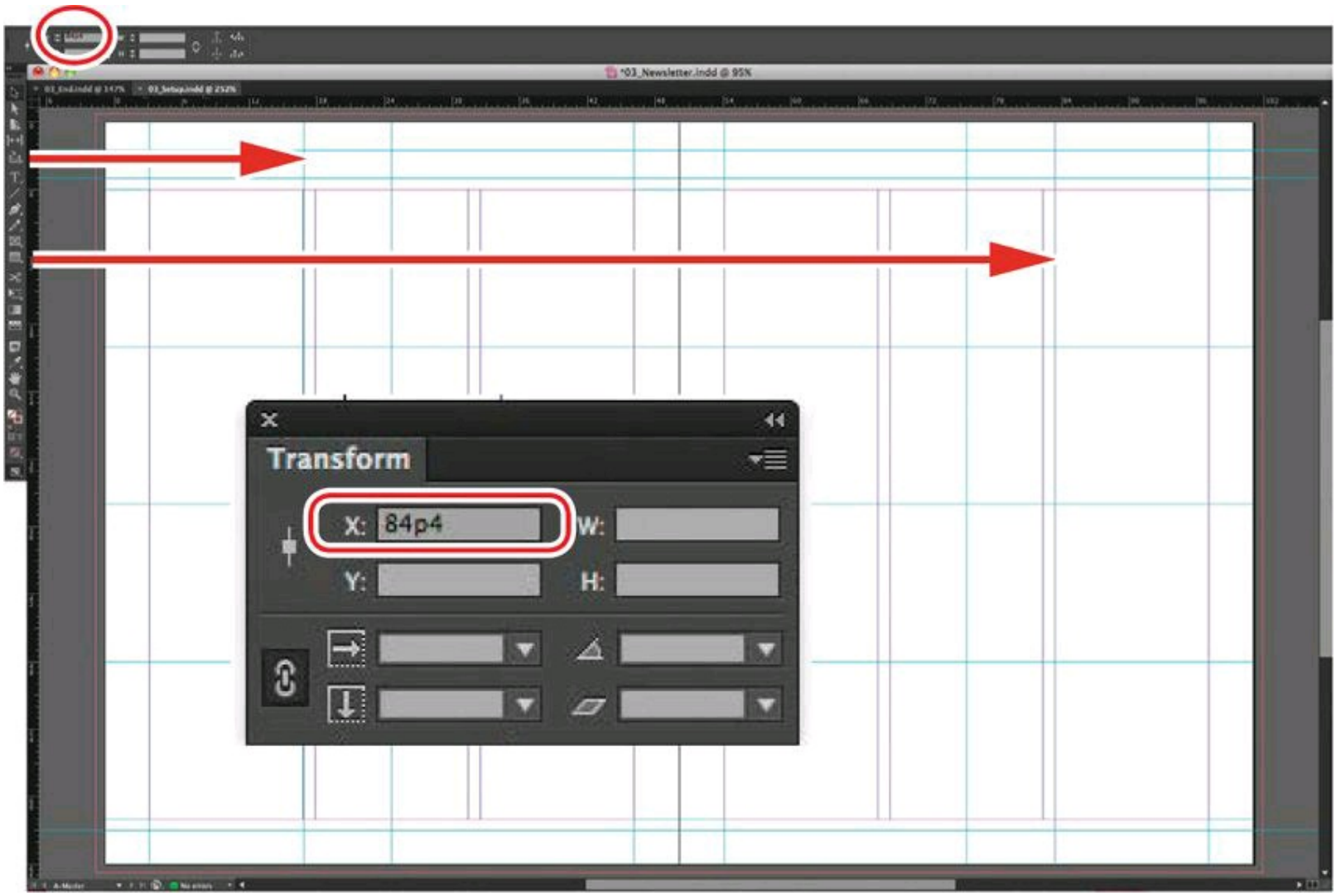
---

2. Open the Transform panel (Window > Object & Layout > Transform). Without clicking in your document, move the pointer around the document window and watch the horizontal and vertical rulers as the pointer moves. Notice how the hairline indicators in the rulers correspond to the pointer's position. Also notice that the dimmed X and Y values in the Control panel and the Transform panel indicate the position of the pointer.
3. Press Ctrl (Windows) or Command (Mac OS) and position your pointer on the horizontal ruler anywhere above the spread. Drag a ruler guide down to 2p6. The Y value is displayed next to the pointer while you drag and is also displayed in the Y box in the Control panel and the Transform panel. Pressing Ctrl (Windows) or Command (Mac OS) when you create a guide causes the guide to extend across both pages of the spread, as well as the pasteboard on either side. If you don't press Ctrl or Command, the guide will extend only across the page on which you release the mouse button.



4. Press Ctrl (Windows) or Command (Mac OS) and drag two more ruler guides from the horizontal ruler: one to 5p and the other to 63p.

5. Press Ctrl (Windows) or Command (Mac OS) and drag a ruler guide from the vertical ruler to the 17p8 position. Watch the X value in the Control panel as you drag. The guide snaps to the column guide at that location. If the X value doesn't display 17p8 as you drag, place the guide as close as you can, and then—with the guide still selected—highlight the X value in the Control panel or Transform panel, enter **17p8**, and then press Enter or Return.
6. Press Ctrl (Windows) or Command (Mac OS) and drag another guide from the vertical ruler to the 84p4 position.



7. Close or dock the Transform panel, and then choose File > Save.

Creating a text frame on the master page

Any text or graphic that you place on a master page appears on document pages to which the master is applied. To create a footer, you'll add a publication title ("HockeyShot Essentials Guide") and a page number marker to the bottom of the verso (left) and recto (right) pages of the document's facing-page master spread.

Note

When you draw a frame with the Type tool, the frame starts at the point of the black arrowhead that's displayed in the upper-left corner of the I-beam pointer. The arrowhead turns white when it's over a guideline.

---

1. Make sure that you can see the bottom of the left master page. If necessary, zoom in and use the scroll bars or Hand tool ( ).

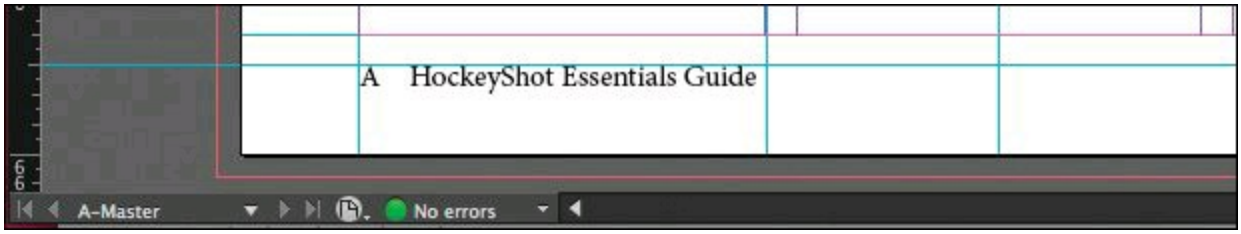
2. Select the Type tool ( ) in the Tools panel. On the left master page, click where the two ruler guides intersect below the leftmost column and drag to create a text frame, as shown below. A white arrowhead is displayed next to the crosshair pointer when you drag over a guideline.

3. With the insertion point in the new text frame, choose Type > Insert Special Character > Markers > Current Page Number.

   The letter A appears in your text frame. On document pages that are based on this master page, the correct page number is displayed, such as "2" on document page 2.

4. To add an em space after the page number, right-click (Windows) or Control-click (Mac OS) with the insertion point in the text frame to display a context menu, and then choose Insert White Space > Em Space. Or you can choose this same command from the Type menu.

5. Type **HockeyShot Essentials Guide** after the em space.



6. Click a blank area of your document window or choose Edit > Deselect All to deselect the text frame.

   Next, you'll duplicate the footer on the left master page, position the copy on the right master page, and adjust the text so that it's a mirror opposite of the other footer.

7. Choose View > Fit Spread In Window so that you can see the bottom of both master pages.

Tip

If you also press the Shift key while Alt-dragging (Windows) or Option-dragging (Mac OS) a text frame, movement is constrained to vertical, horizontal, and 45-degree angles.

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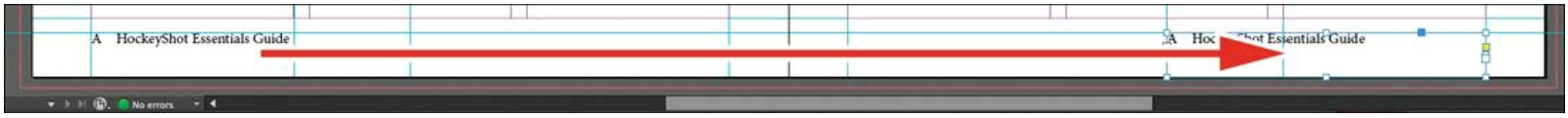
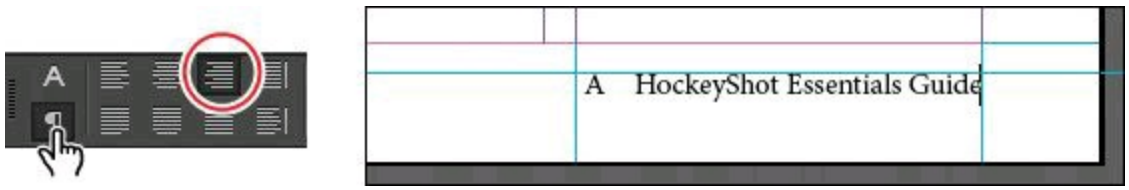
8. Using the Selection tool ( ), select the footer text frame on the left master page. Hold down the Alt key (Windows) or Option key (Mac OS), and drag the text frame to the right master page so that it snaps to the guides, mirroring the left master page as shown below.



9. Select the Type tool ( ), and click anywhere inside the text frame on the right master page, creating an insertion point.

10. Click Paragraph Formatting Controls ( ) in the Control panel, and then click the Align Right button.



Click Paragraph Formatting Controls at the left side of the Control panel to see the alignment options.

The text is now right-aligned within the footer frame on the right master page. Now you'll modify the footer text on the right master page, placing the page number on the right side of the words "HockeyShot Essentials Guide."

Tip

Depending on the size of your monitor, the paragraph formatting controls in the Control panel may be visible (to the right of the character formatting controls) without having to click the Paragraph Formatting Controls button.

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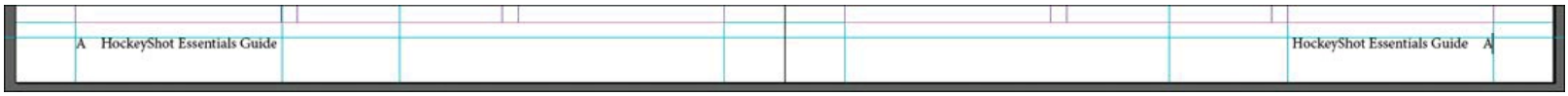
11. Delete the em space and page number at the beginning of the footer.
12. Place the insertion point at the end of "HockeyShot Essentials Guide" and then choose Type > Insert White Space > Em Space.
13. Choose Type > Insert Special Character > Markers > Current Page Number to insert the Current Page Number character after the em space.



Left footer and right footer

14. Choose Edit > Deselect All, and then choose File > Save.

Renaming the master page

When documents contain several master pages, you may want to assign a descriptive name to each master page to make them all easier to identify. You will rename this first master page "3-column Layout."

1. Choose Window > Pages if the Pages panel is not open. Confirm that the A-Master page is still selected. Choose Master Options For "A-Master" from the Pages panel menu ( ).
2. In the Name box, type **3-column Layout**, and click OK.

Tip

In addition to changing the names of master pages, you can use the Master Options dialog box to change other properties of a master page, such as the prefix, number of pages in the master page spread, and whether or not the master page is based on another master.

Adding placeholder frames for text

Each document page in the newsletter will contain text and graphics. The main text frame and graphics frame are the same on each page, so you'll create a placeholder text frame and a placeholder graphics frame on the left and right pages of the A-3-column Layout master page.

Tip

If you'd like to set up a master page spread with different margin and column settings for the left and right pages, you can double-click the individual page in the master page spread, and then change the selected page's settings by choosing Layout > Margins And Columns.

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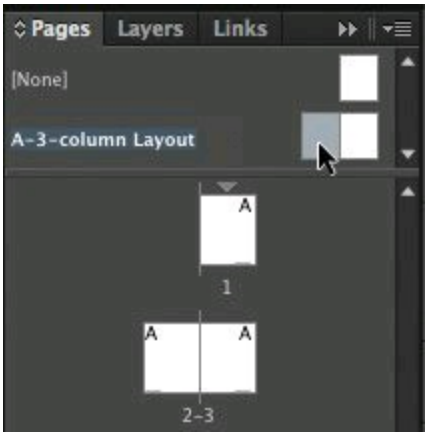
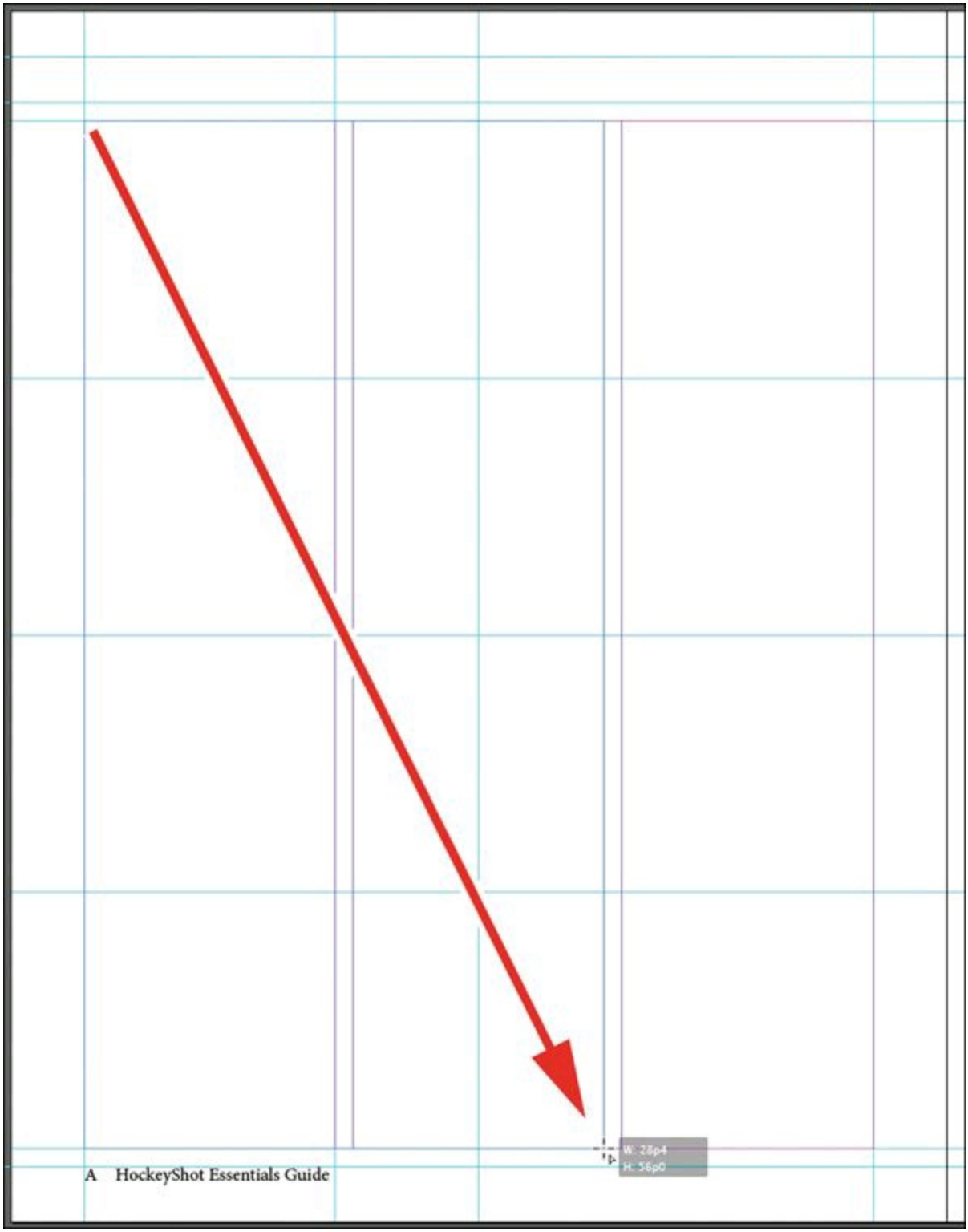
1. To center the left page in the document window, double-click the left page icon of the A-3-column Layout master in the Pages panel.



2. Select the Type tool ( ). Click where the horizontal and vertical margin guides intersect in the upper-left corner of the page, and drag to create a text frame that extends horizontally across two columns and vertically from the top margin to the bottom margin.



3. Double-click the right page icon of the A-3-column Layout master in the Pages panel to center it in the document window.
4. With the Type tool ( ), create another text frame on the right page that's identical to the text frame you just created on the left page. Make sure the upper-left corner of the frame aligns with the intersection of the margin guides in the upper-left corner of the page.
5. Click a blank area of the page or pasteboard, or choose Edit > Deselect All.
6. Choose File > Save.

Adding placeholder frames for graphics

You have now created placeholder text frames for the main text on each page. Next, you'll add two graphics frames to the A-3-column Layout master. Similar to the text frames you created, these frames

act as placeholders for graphics you'll later place on document pages, helping you to maintain a consistent design.

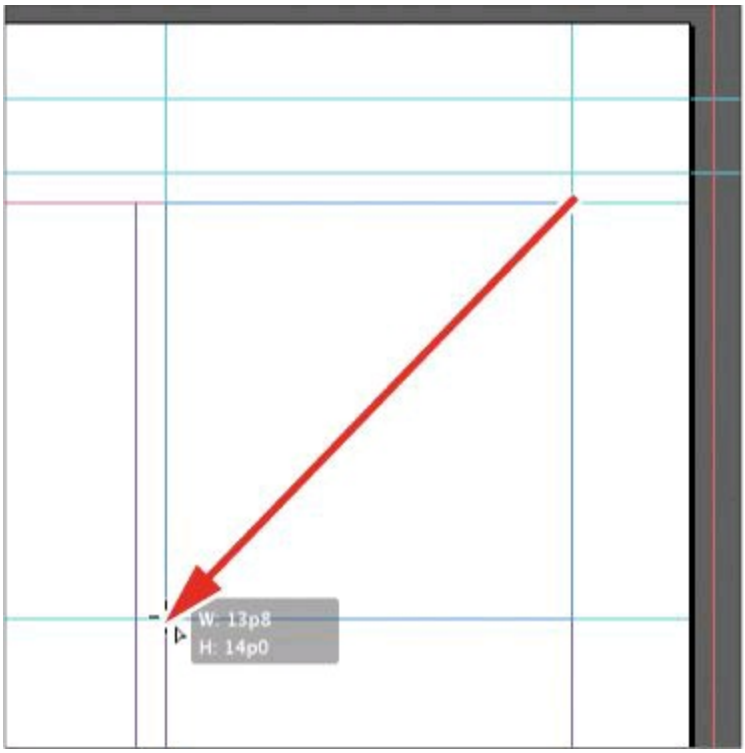
Note

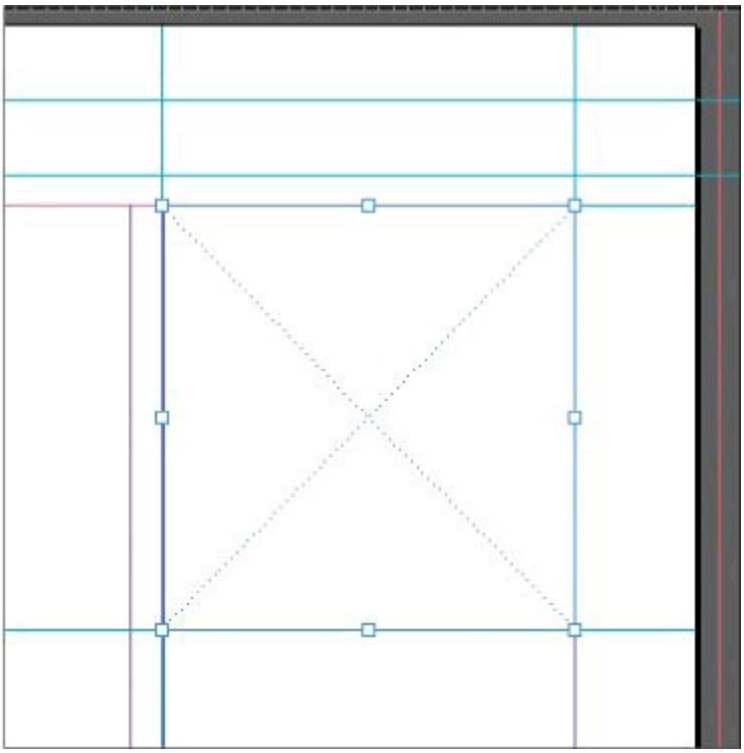
It's not necessary to add placeholder frames to every document you create. For example, one-page documents, such as business cards and ads, don't require master pages and placeholder frames.

Although the Rectangle tool ( ) and the Rectangle Frame tool ( ) are more or less interchangeable, the Rectangle Frame tool, which includes a nonprinting X, is commonly used to create placeholders for graphics.

1. Select the Rectangle Frame tool ( ) in the Tools panel.
2. Position the crosshair pointer at the intersection of the top margin guide and the right margin guide on the right page.

   Drag down and to the left to create a frame that extends one column width horizontally and vertically to the next ruler guide.





3. Create an identical placeholder graphics frame on the left page.
4. Use the Selection Tool to click a blank area of the page or pasteboard, or choose Edit > Deselect All.
5. Choose File > Save.

Creating an additional master page

You can create multiple master pages within a document. You can build them independently or base one master page on another master page. If you base a master page on another master, any change made to the parent master is automatically applied to the child master.

For instance, the A-3-column Layout master page is useful for most of the pages in the newsletter and

can be used as the basis for another set of master pages that share key layout elements, such as margins and the current page number character.

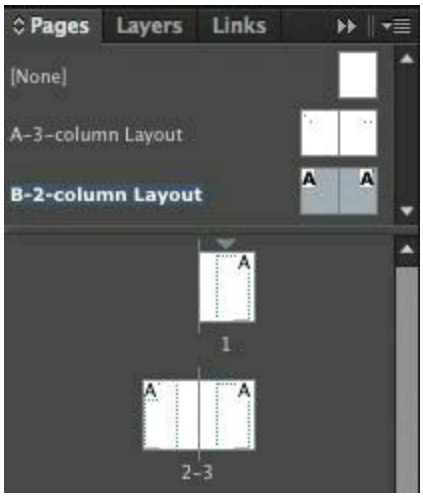
To accommodate different layouts, you will create a separate master page spread that uses a two-column format, and then you'll modify the two-column layout.

1. In the Pages panel, choose New Master from the Pages panel menu.
2. In the Name box, type **2-column Layout**.
3. From the Based On Master menu, choose A-3-column Layout, and click OK.

   Notice that the letter A is displayed on the B-2-column Layout master page thumbnails at the top of the Pages panel. This letter indicates that the A-3-column Layout master serves as the foundation for the B-2-column Layout master. If you were to change the A-3-column Layout master, the changes would also be reflected in the B-2-column Layout master. You may also notice that you cannot easily select objects, such as the footers, from parent master pages. You'll learn about selecting and overriding master page items later in this lesson.

Tip

If all of the master page icons are not visible in the Pages panel, click the horizontal bar that separates the master page icons from document page icons and drag down until the other master page icons are visible.



4. Choose Layout > Margins And Columns.
5. In the Margins And Columns dialog box, set the number of columns to **2**, and then click OK.

Overriding master items

The document pages that will use the two-column layout do not require placeholder frames, which means that only the footer text frames and the ruler guides from the A-3-column Layout master are required. Next, you'll remove the placeholder frames from the B-2-column Layout master.

1. Using the Selection tool ( ), click within the graphics frame on the left page of the B-2-column Layout master. Nothing happens. Because this frame is inherited from the parent master, you can't select it with a simple click.
2. Hold down Shift+Ctrl (Windows) or Shift+Command (Mac OS), and then click within the graphics frame. The frame is now selected, and you have overridden its status as a master item.

Press Backspace or Delete to delete the frame.

Tip

To override multiple master page items, hold down Shift+Ctrl (Windows) or Shift+Command (Mac OS) and with the Selection tool, drag a marquee around the objects you want to override.

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3. Use the same method to delete the placeholder graphics frame on the right page, as well as the placeholder text frame on the left and right pages.
4. Choose File > Save.

Modifying a parent master

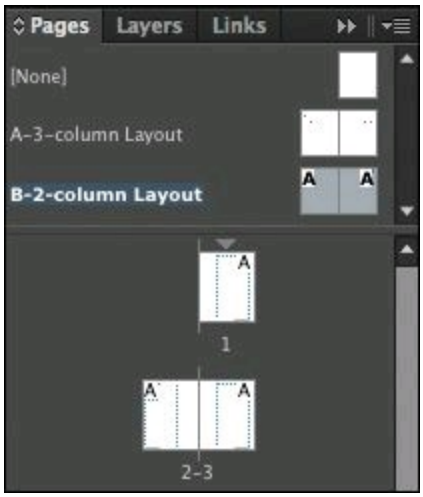
To complete your work laying out the newsletter's master pages, you'll add several header elements to the top of the A-3-column Layout master and another footer element to the right page. Then you'll view the B-2-column Layout master and see how the new objects are automatically added to that master page spread.

Note

You'll learn more about creating and modifying text frames, graphics frames, and other kinds of objects in Lesson 4, "Working with Objects."

Rather than manually laying out the additional header and footer frames, you'll import a *snippet*. A snippet is a file that contains InDesign objects, including their location relative to one another on a page or spread, and can be imported into a layout with the Place command (File menu) the same way you import graphic files. InDesign lets you export selected objects as a snippet file and place snippets into documents. (You'll use snippets again later in this lesson, and you'll learn more about snippets in Lesson 10, "Importing and Modifying Graphics.")

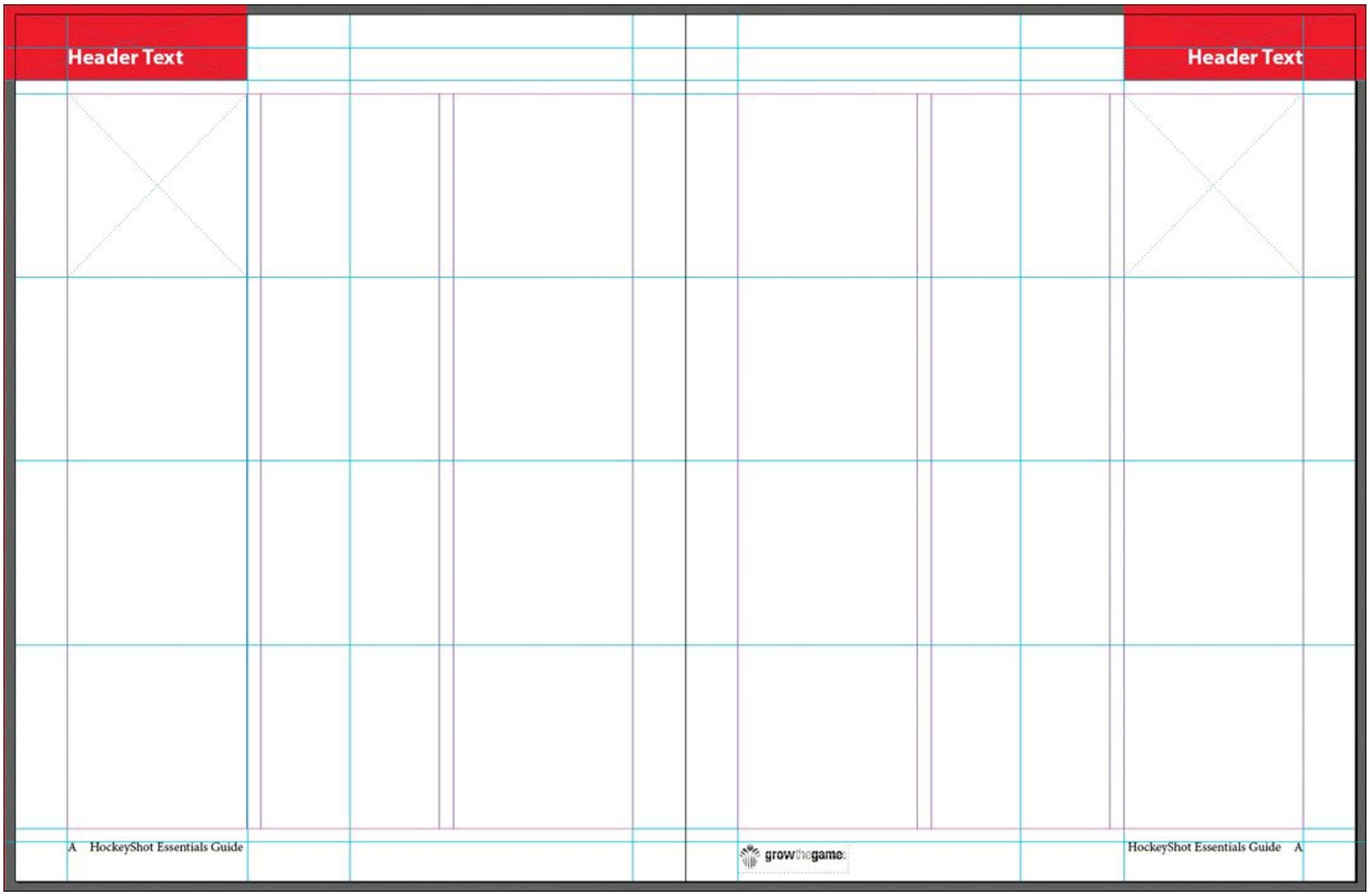
1. Double-click the name of the A-3-column Layout master in the Pages panel to display the spread.
2. Choose File > Place. Open the Links folder in the Lesson03 folder, located inside the Lessons folder within the InDesign CIB folder. Click the file named Snippet1.idms, and then click Open.



3. Position the loaded snippet icon ( ) outside the upper-left corner of the spread, where the red

bleed guides meet. Click to place the snippet.

The snippet places a header at the top of each page, as well as an imported graphic at the bottom of the right page. Each header includes an empty red graphics frame and a text frame with white placeholder text.



Tip

To create a snippet, select one or more objects on a page or spread. Choose File > Export, and then choose InDesign Snippet from the Save As Type menu (Windows) or the Format menu (Mac OS). Choose the location of the file, assign a name, and then click Save.

4. Double-click the name of the B-2-column Layout master in the Pages panel. Notice how the new elements you just applied to the A-3-column Layout master have been automatically applied to this child master.
5. Choose File > Save.

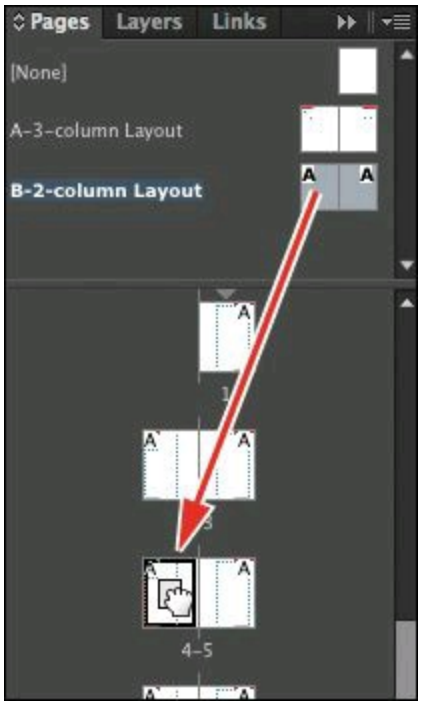
Applying master pages to document pages

Now that you have created all of the master pages, it's time to apply them to the pages in the document. By default, all of the document pages are formatted with the A-3-column Layout master. You will apply the B-2-column Layout master to several pages in the newsletter, and then you'll apply the None master page to the cover page, which doesn't require header or footer information and

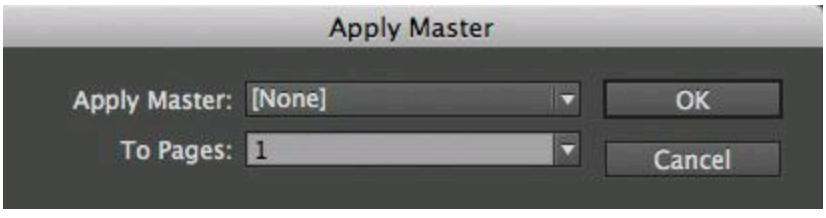
thus does not require a master page.

You can apply master pages to document pages by dragging master page icons onto document page icons or by using an option in the Pages panel menu. In large documents, you may find it easier to display the page icons horizontally in the Pages panel. To do this, choose View Pages > Horizontally from the Pages panel menu.

1. Double-click the name of the B-2-column Layout master in the Pages panel. Make sure that all master pages and document pages are visible in the panel.
2. Drag the left page icon of the B-2-column Layout master onto the icon of document page 4. When page 4 is displayed with a black border, indicating it's the page to which the selected master will be applied, release the mouse button.



3. Drag the right page icon of the B-2-column Layout master onto the icon of document page 5, and then drag the left page icon onto document page 8.
4. Double-click the page numbers 4–5 (below the page icons) in the Pages panel to display this spread. Notice that the two pages of this spread have the two-column layout of the applied master page, as well as the header and footer elements that you placed on the parent master page. Also notice that the correct page numbers are displayed on each page as a result of the Current Page Number characters you placed on the A-3-column Layout master page spread.
5. Double-click the icon for document page 1. Because it's based on the A-3-column Layout master, it includes header and footer elements, which aren't required on the cover of the newsletter.
6. Choose Apply Master To Pages from the Pages panel menu. In the Apply Master dialog box, choose [None] from the Apply Master menu and make sure that 1 is the page number in the To Pages box. Click OK.

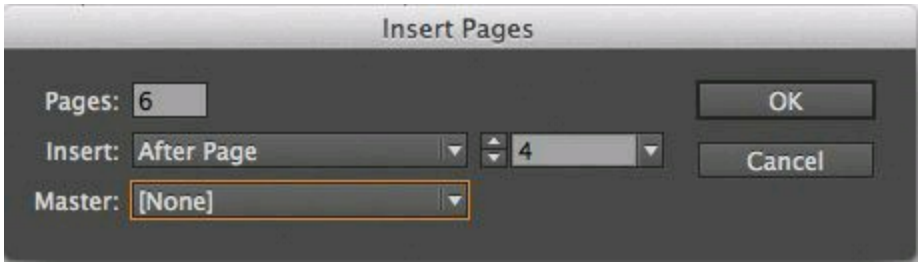


7. Choose File > Save.

Adding new document pages

You can add new pages to your existing document. Next, you're going to add six additional pages to your newsletter. Later in this lesson, you'll use four of these pages for a "special section" within your newsletter that uses a different page size and separate page numbering.

1. In the Pages panel menu, choose Insert Pages.
2. In the Insert Pages dialog box, type **6** in the Pages box, choose After Page from the Insert menu and enter **4** in the accompanying (page number) box, and then choose [None] from the Master menu.



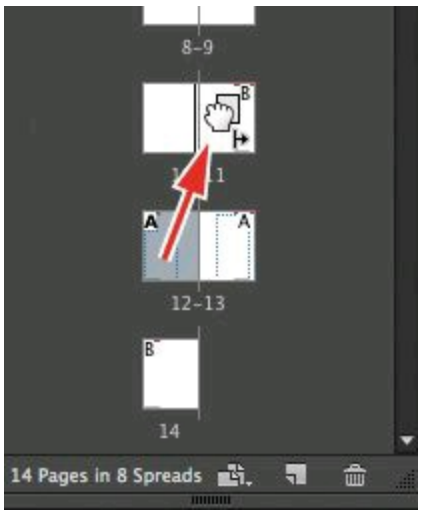
3. Click OK. Six blank pages are added in the middle of the document. Lengthen the Pages panel so that you can see all document pages.

Rearranging and deleting document pages

You can use the Pages panel to rearrange the sequence of pages and delete extra pages.

1. In the Pages panel, click on page 12 to select it. Notice that it's based on the A-3-column Layout master. Drag the page 12 icon upward onto the icon for page 11, which is based on the B-2-column Layout master. When the small arrow inside the hand is pointing to the right, indicating that page 11 will be "pushed" in that direction, release the mouse button.

   Notice that page 11 is now based on the A-3-column Layout master, and the page that had previously been page 11 is now page 12. Pages 13 and beyond remain unchanged.



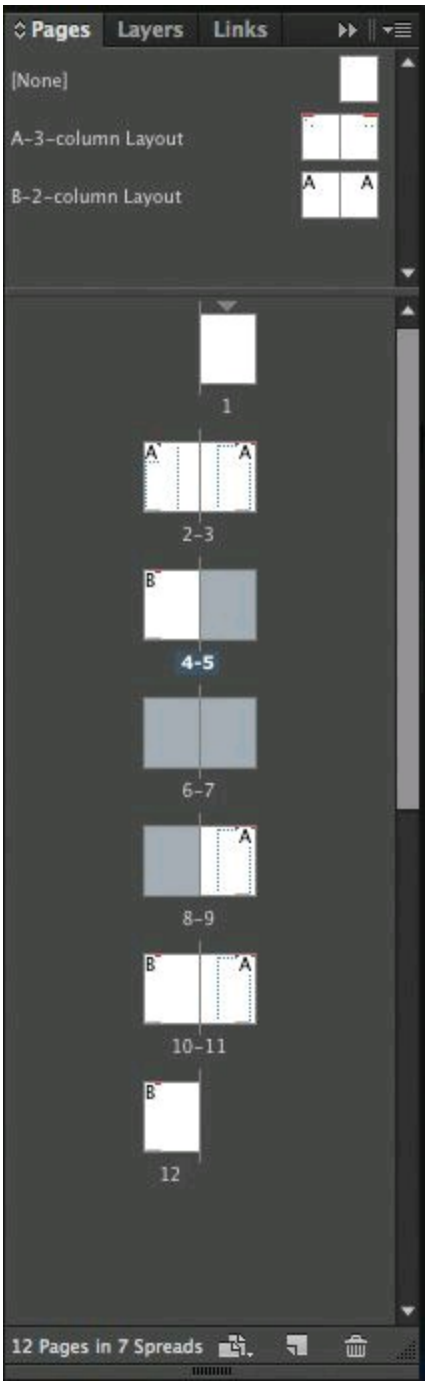
2. Click page 5, and then press the Shift key and click page 6 (two of the six pages you inserted earlier) to select it, too.
3. Click the Delete Selected Pages button icon ( )at the bottom of the panel. Pages 5 and 6 are deleted from the document, leaving it with 12 pages.

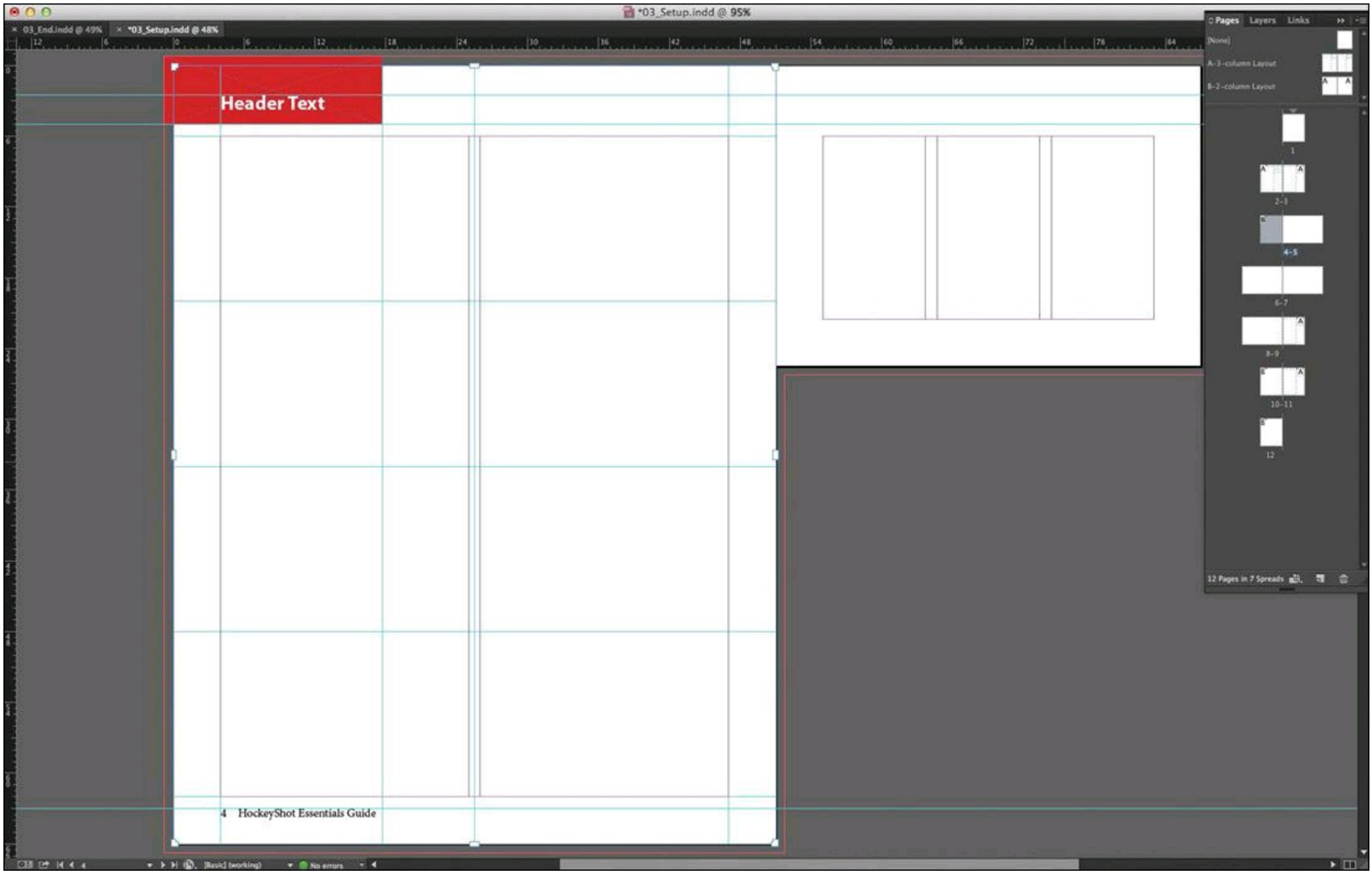
4. Choose File > Save.

Changing the size of pages

Next, you'll create an insert within the newsletter by changing the size of the pages in the "special section" you created earlier in the lesson. You'll then quickly lay out the two spreads that make up this section.

1. Select the Page tool ( ). Click page 5 in the Pages panel, and then press the Shift key and click page 8. The icons for pages 5–8 are highlighted in the panel. These are the pages whose size you will change.
2. In the Control panel, enter **36p** in the Width box; enter **25p6** in the Height box. Press Enter or Return each time you enter a value to apply it to the selected pages. (These values produce a 6″ × 4.25″ insert—the size of a standard postcard.)
3. Double-click page 4 in the Pages panel, and then choose View > Fit Spread In Window. Notice that the spread now contains pages of unequal size.



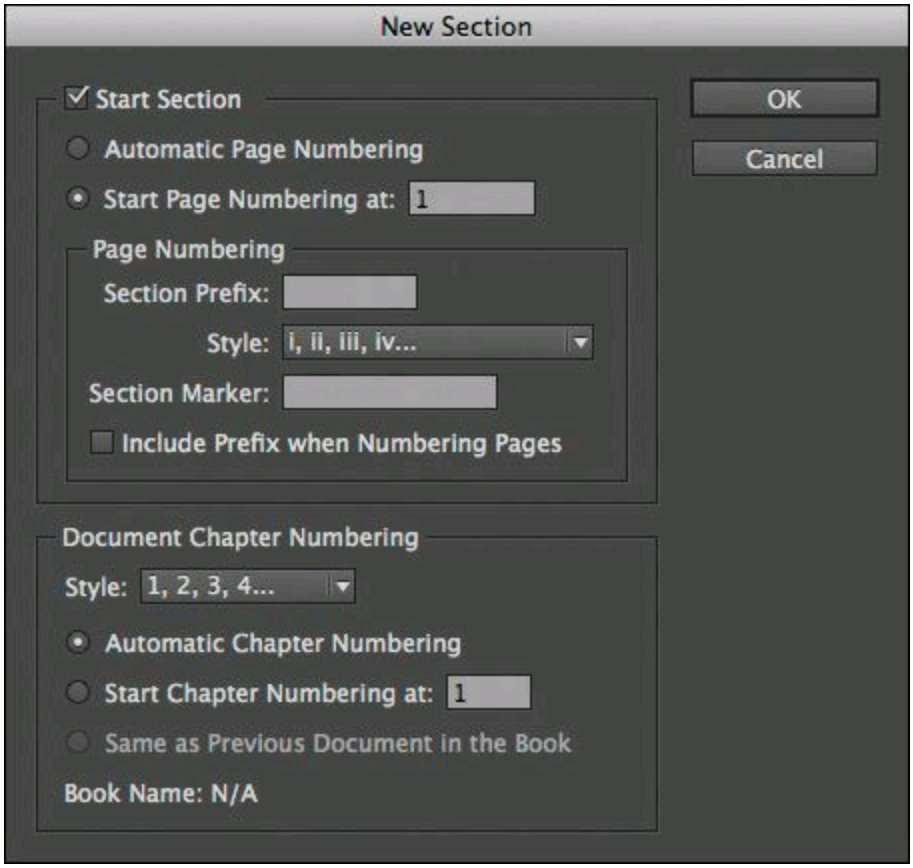


4. Use the Page tool to select pages 5–8.
5. To set new margin and column guides for the selected pages, choose Layout > Margins And Columns to display the Margins And Columns dialog box. In the Margins section, make sure that the Make All Settings The Same icon ( ) in the center is selected (unbroken) so that you can enter one setting for all four margins. Enter **1p6** in the Top box. In the Columns section, enter **1** in the Number box, and then click OK.

Adding sections to change page numbering

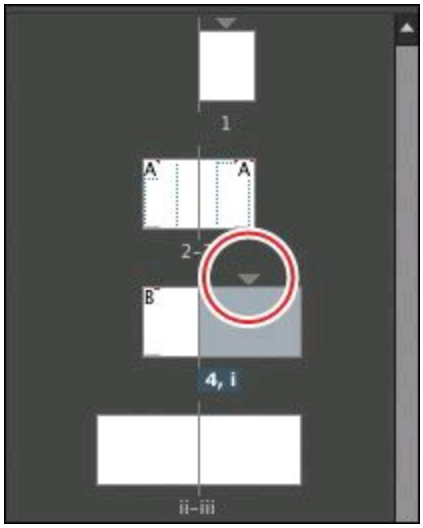
The special section you just created will use its own page-numbering system. You can use different kinds of page numbering within a document by creating sections. Next, you'll start a new section on the first page of the special section, and then you'll adjust the page numbering of the subsequent newsletter pages so that they're numbered correctly.

1. In the Pages panel, double-click the page 5 icon to select and display it.
2. Choose Numbering & Section Options from the Pages panel menu. In the New Section dialog box, make sure that Start Section and Start Page Numbering At are selected and that the Start Page Numbering At value is 1.
3. Choose i, ii, iii, iv... from the Style menu in the Page Numbering section of the dialog box. Click OK.



4. Examine the page icons in the Pages panel. Starting with the fifth document page, the numbers below the page icons now appear as Roman numerals. The numbers in the footers of the remaining document pages that contain footers also appear as Roman numerals.

Now you'll specify for the document to use Arabic numerals for the newsletter pages that follow the special section and to continue the numbering from the page prior to the first page of the special section (page 4).



The triangle above the page i icon indicates the start of a section.

Note

Single-clicking a page icon targets the page for editing purposes but does not cause that page to be displayed in the document window. If you want to navigate to a page, double-click its icon in the Pages panel.

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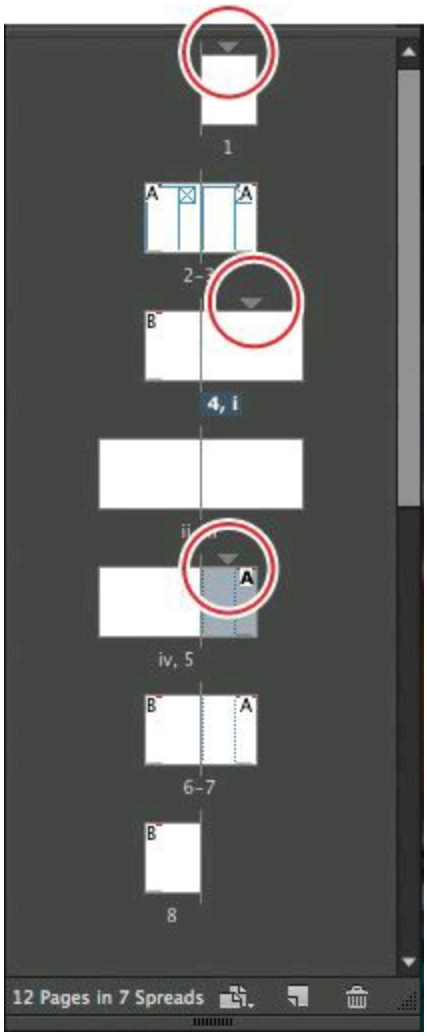
5. Select page v in the Pages panel by clicking once on its icon.
6. Choose Numbering & Section Options from the Pages panel menu.
7. In the New Section dialog box, make sure that Start Section is selected.
8. Select Start Page Numbering At and specify a value of **5** in the accompanying box to start section numbering on page 5 and resume the numbering of the document pages (1–4) that precede the special section.
9. Make sure that 1, 2, 3, 4... is selected in the Style menu, and then click OK.



Now your pages are correctly renumbered. Notice that a small gray triangle is displayed above pages 1, i, and 5 in the Pages panel, indicating the start of a new section.

10. Choose File > Save.

Overriding master page items on document pages and placing text and graphics

Now that the framework of the 12-page publication (the eight-page guide and four-page insert) is in place, you're ready to lay out document pages. To see how the work you've done setting up the document's master pages affects the document pages, you'll add text and graphics to the spread on pages 2 and 3. You'll learn more about creating and modifying objects in Lesson 4, so for this lesson, we've simplified the layout process to minimize your work.

1. Choose File > Save As, name the file **03_Newsletter.indd**, navigate to the Lesson03 folder, and click Save.
2. In the Pages panel, double-click the page 2 icon (not page ii), and then choose View > Fit

Spread In Window.

Notice that since the A-3-column Layout master is assigned to pages 2 and 3, these pages include the guides, headers and footers, and placeholder frames from the A-3-column Layout master.

To import text and graphics created with other applications, such as a text file from Microsoft Word or an image from Adobe Photoshop, you use the Place command.

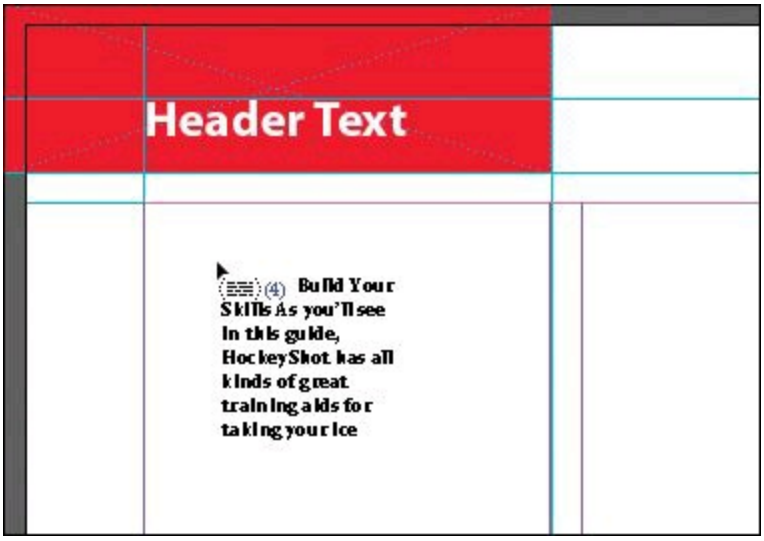
3. Choose File > Place. If necessary, open the Links folder in the Lesson03 folder, located inside the Lessons folder within the InDesign CIB folder. Click the Article1.txt file, and then Shift-click the Graphic2.jpg file. Four files are selected: Article1.txt, Article2.txt, Graphic1.jpg, and Graphic2.jpg. Click Open.

Tip

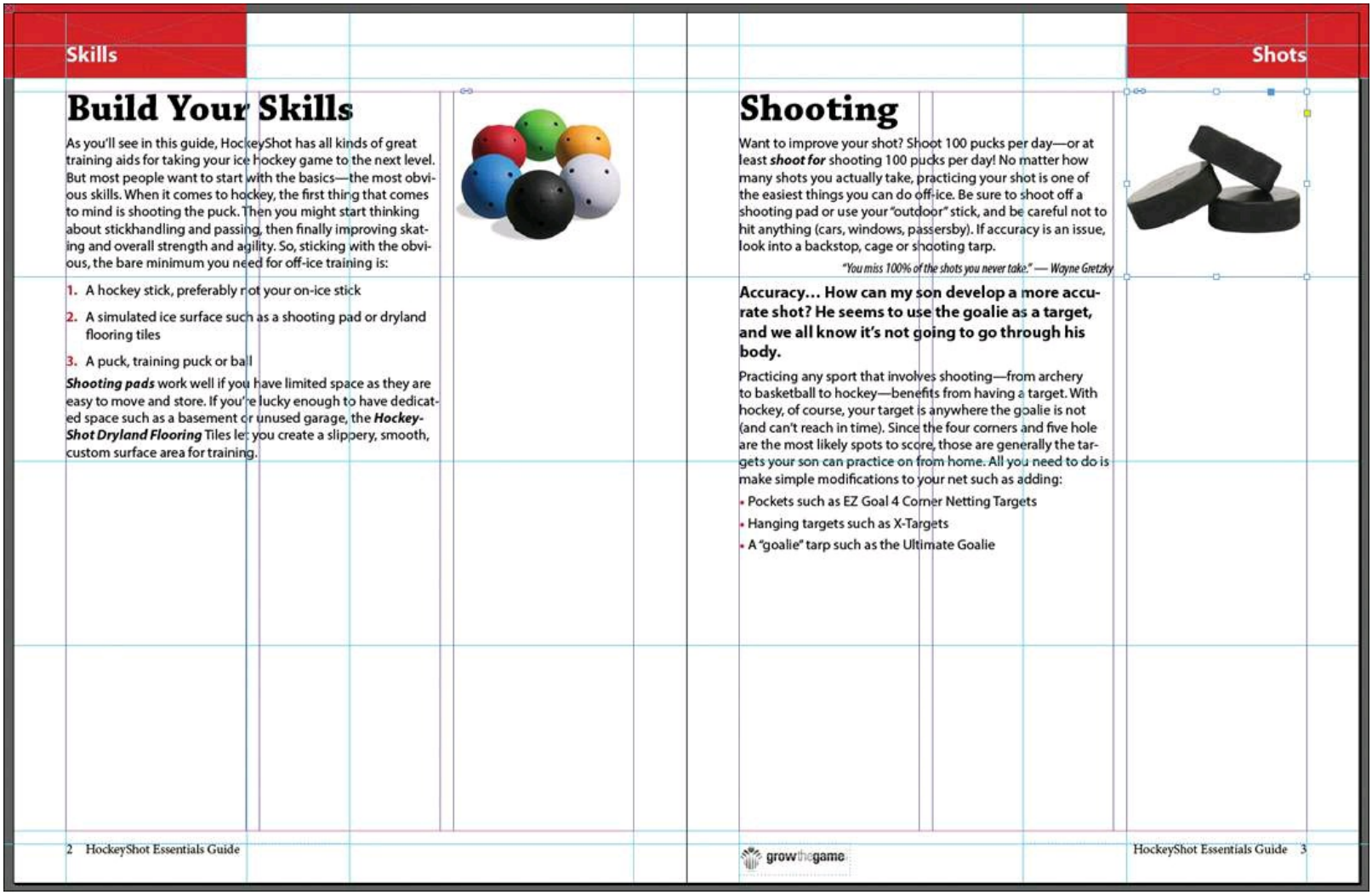
Parentheses are displayed when InDesign recognizes a preexisting frame beneath the loaded text icon or the loaded graphics icon when importing text or graphics into a layout. If you click within an existing frame, InDesign uses that frame rather than create a new text or graphics frame.

The pointer changes to a loaded text icon (), with a preview of the first few lines of the Article1.txt text file that you are placing.

4. Position the loaded text icon over the placeholder text frame on page 2, and then click to place the Article1.txt text into the frame.



5. To place the three remaining files, click within the text frame on page 3 to place the Article2.docx text, click within the graphics frame on page 2 to place Graphic1.jpg, and click within the graphics frame on page 3 to place Graphic2.jpg.

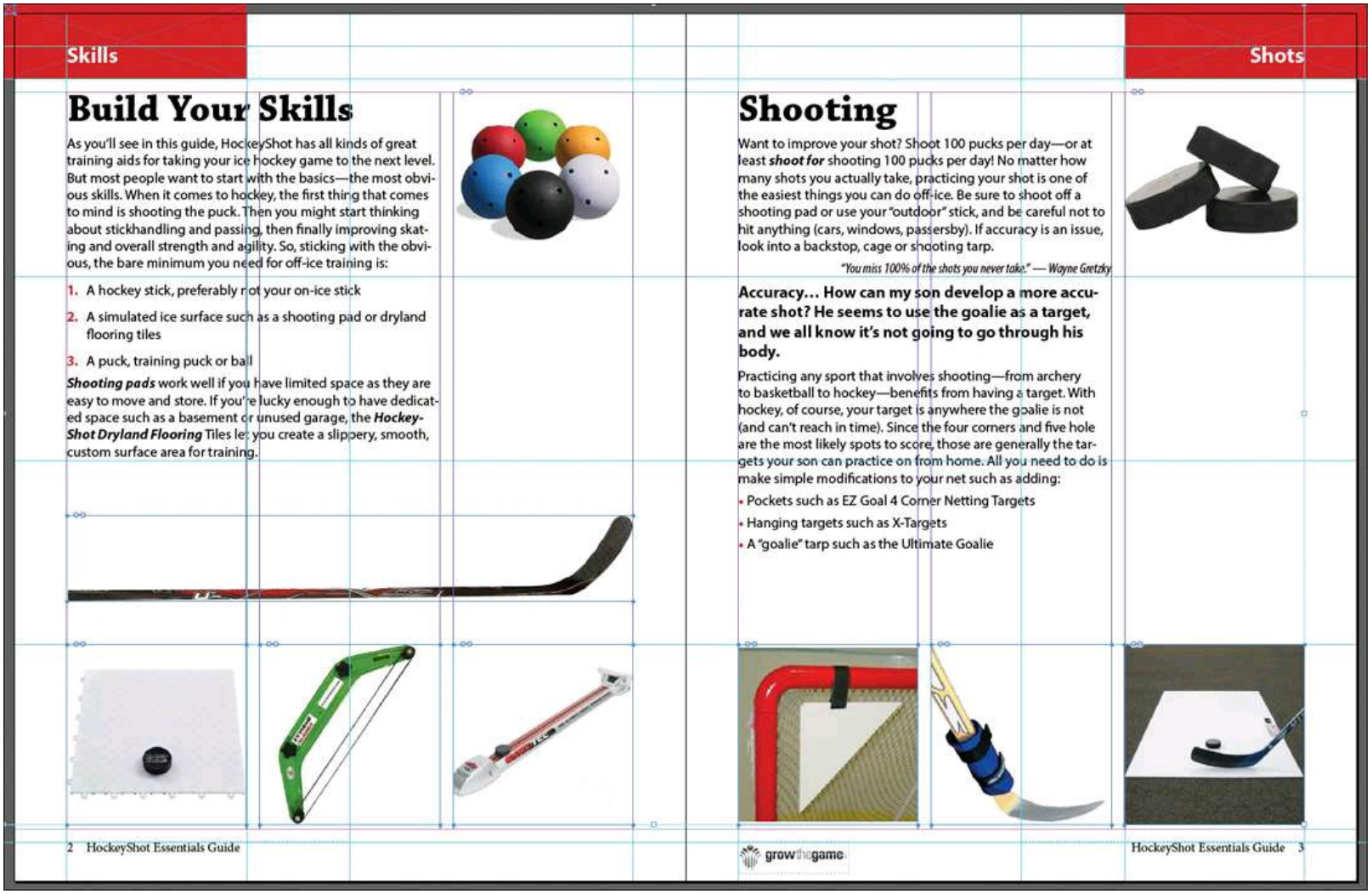


6. Choose Edit > Deselect All.

   You'll import a snippet to complete the layout of the spread.

7. Choose File > Place. Click the Snippet2.idms file, and then click Open.

8. Position the loaded snippet icon ( ) outside the upper-left corner of the spread, where the red bleed guides meet. Click to place the snippet.



9. Choose Edit > Deselect all, or click an empty area of the page or pasteboard to deselect all objects.
10. Choose File > Save.

Next, you'll override two master items on your spread—the text frames that contain the header text—and then replace the placeholder text with new text.

1. Select the Type tool (T). Hold down Shift+Ctrl (Windows) or Shift+Command (Mac OS), and then click within the placeholder text frame on page 2 that contains "Header Text." Replace the placeholder text with **Skills**.
2. Repeat step 1 to change the header text on page 3 to **Shots**.
3. Choose Edit > Deselect All.
4. Choose File > Save.

Viewing the completed spread

At this point you're ready to hide guides and frames and see what the completed spread looks like.

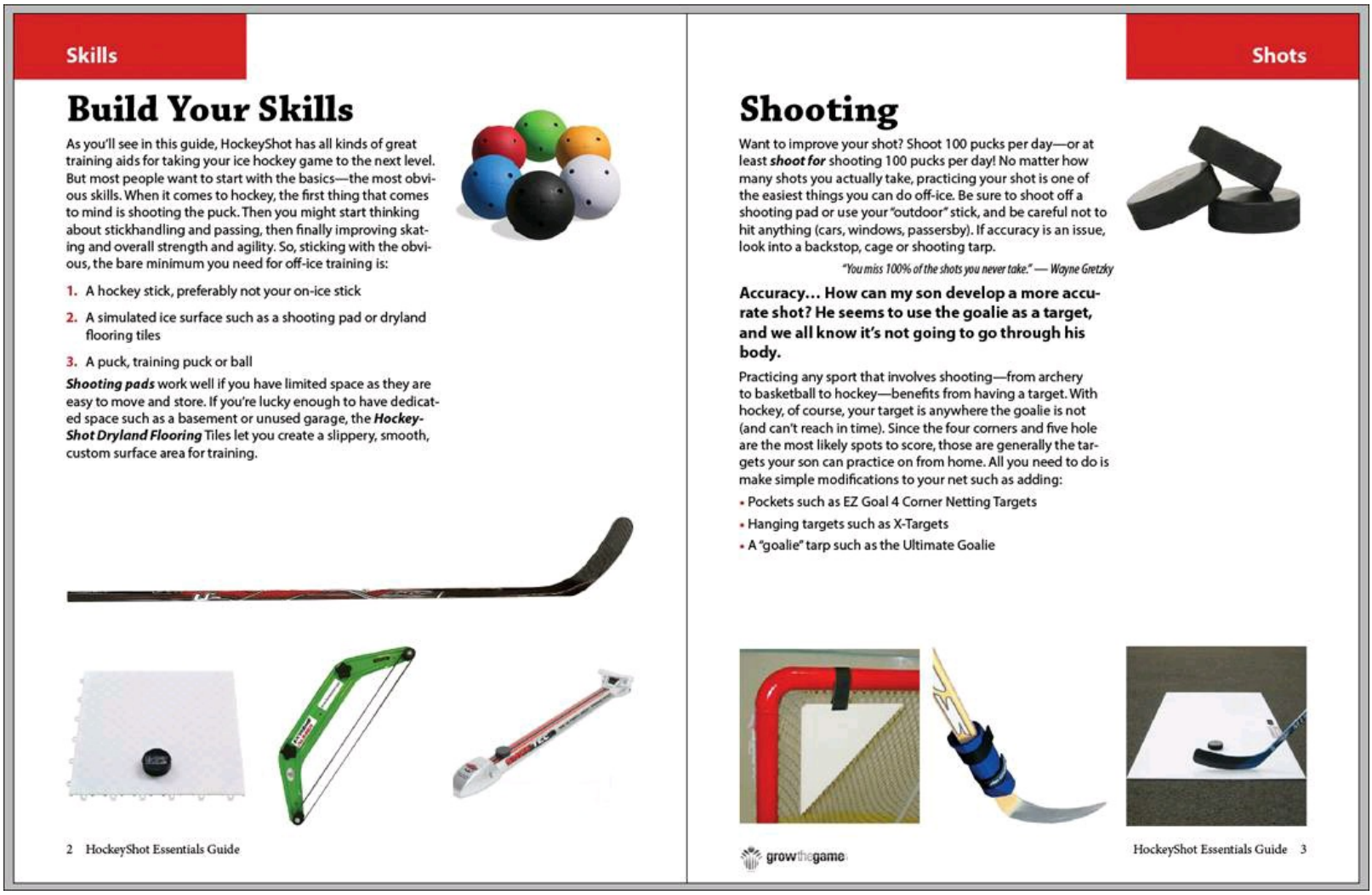
1. Select the Selection tool (), and double-click the page 2 icon in the Pages panel to display it.
2. Choose View > Fit Spread In Window and hide any panels, if necessary.

Tip

To alternately hide and show all panels, including the Tools panel and Control panel,

press Tab. (You can't do this when you're working with text using the Type tool.)

3. Choose View > Screen Mode > Preview to hide the pasteboard and all guides, grids, and frame edges.



Skills

Build Your Skills

As you'll see in this guide, HockeyShot has all kinds of great training aids for taking your ice hockey game to the next level. But most people want to start with the basics—the most obvious skills. When it comes to hockey, the first thing that comes to mind is shooting the puck. Then you might start thinking about stickhandling and passing, then finally improving skating and overall strength and agility. So, sticking with the obvious, the bare minimum you need for off-ice training is:

1. A hockey stick, preferably not your on-ice stick
2. A simulated ice surface such as a shooting pad or dryland flooring tiles
3. A puck, training puck or ball

Shooting pads work well if you have limited space as they are easy to move and store. If you're lucky enough to have dedicated space such as a basement or unused garage, the ***Hockey-Shot Dryland Flooring*** Tiles let you create a slippery, smooth, custom surface area for training.

2 HockeyShot Essentials Guide

Shots

Shooting

Want to improve your shot? Shoot 100 pucks per day—or at least ***shoot for*** shooting 100 pucks per day! No matter how many shots you actually take, practicing your shot is one of the easiest things you can do off-ice. Be sure to shoot off a shooting pad or use your "outdoor" stick, and be careful not to hit anything (cars, windows, passersby). If accuracy is an issue, look into a backstop, cage or shooting tarp.

"You miss 100% of the shots you never take." — Wayne Gretzky

Accuracy… How can my son develop a more accurate shot? He seems to use the goalie as a target, and we all know it's not going to go through his body.

Practicing any sport that involves shooting—from archery to basketball to hockey—benefits from having a target. With hockey, of course, your target is anywhere the goalie is not (and can't reach in time). Since the four corners and five hole are the most likely spots to score, those are generally the targets your son can practice on from home. All you need to do is make simple modifications to your net such as adding:

- Pockets such as EZ Goal 4 Corner Netting Targets
- Hanging targets such as X-Targets
- A "goalie" tarp such as the Ultimate Goalie

growthegame

HockeyShot Essentials Guide 3

You have formatted enough of the 12-page document to see how adding objects to the master pages helps you maintain a consistent design throughout your document.

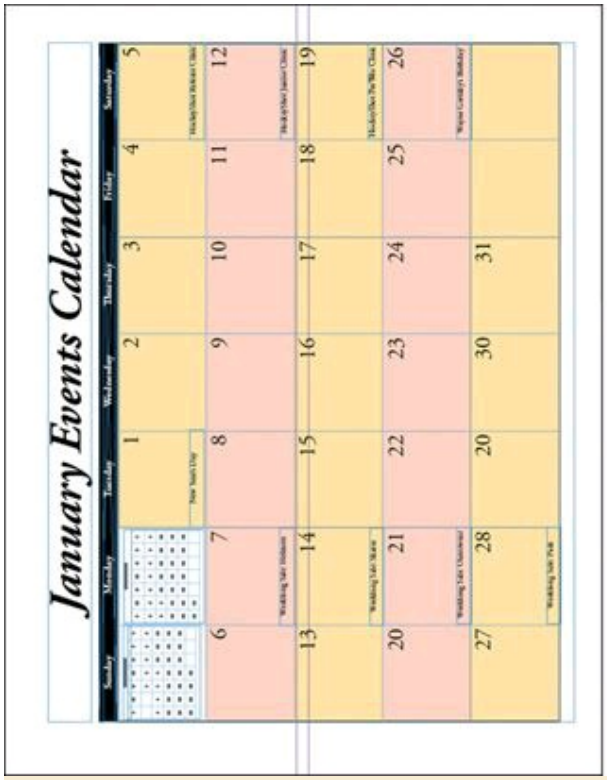
4. Choose File > Save.

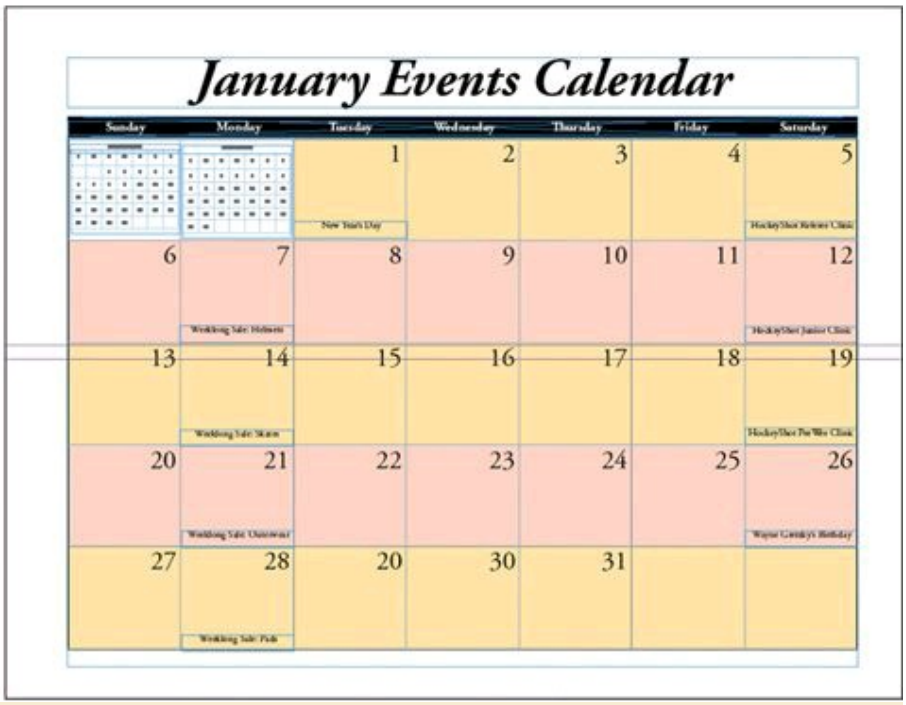
Congratulations. You have finished the lesson.

Rotating spreads

In some cases, you may want to rotate a page or spread to make it easier to view and work on its content. For example, a standard-sized magazine with portraitoriented pages might require a calendar page with a landscape orientation. You could lay out such a page by rotating all objects 90 degrees, but then you would have to turn your head or rotate your monitor to modify the layout and edit text. To make editing easier, you can rotate—and unrotate—spreads. For an example of this feature, open the 03_End.indd document in the Lesson_03 folder (if it's not already open).

1. In the Pages panel, double-click page 4 to display it in the document window.
2. Choose View > Fit Page In Window to center the page within the document window.
3. Choose View > Rotate Spread > 90° CW, and then choose View > Fit Page In Window.





After you rotate the spread (right), it's easier to work with the objects on the page.

4. Choose View > Rotate Spread > Clear Rotation.
5. Close the document without saving changes.

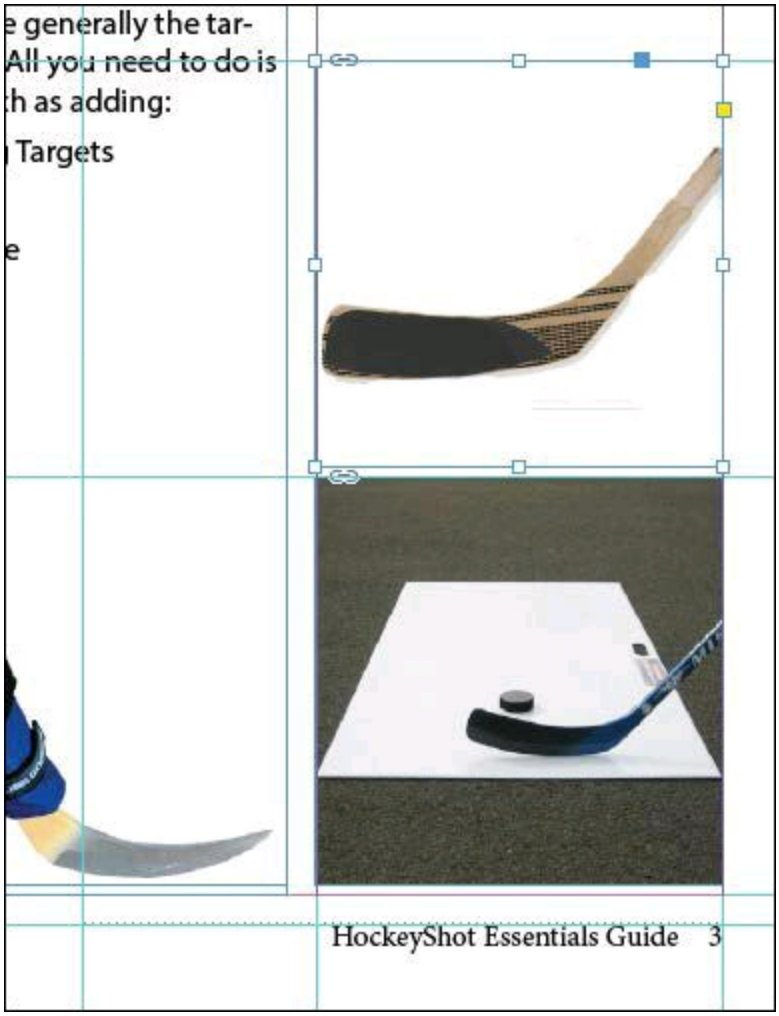
Exploring on your own

A good way to reinforce the skills you've learned in this lesson is to experiment with them. Try some of the following exercises. They'll give you more practice with InDesign techniques.

Tip

Choose View > Screen Mode > Normal to return to normal display as you explore on your own.

1. Place another photograph in the third column on page 3. Use the GraphicExtra.jpg image that is inside the Links folder in the Lesson03 folder. After you click Open in the Place dialog box, click where the horizontal ruler guide intersects with the left margin of the third column, drag until the frame is as wide as the column, and then release the mouse button.



2. Create another master page for the document. Base it on the A-3-column Layout master, name it **C-4-column Layout**, and then modify it so that it contains four columns instead of three. Apply the new master page to any of the document's full-sized pages that doesn't contain objects (1 or 5–8).

Review questions

1. What are the advantages of adding objects to master pages?
2. How do you change the page-numbering scheme within a document?
3. How do you select a master page item on a document page?
4. What's the advantage of basing a new master page on an existing master page?

Review answers

1. By adding objects such as guides, footers, and placeholder frames to master pages, you can maintain a consistent layout on the pages to which the master is applied.
2. In the Pages panel, select the page icon where you want new page numbering to begin. Then, choose Numbering & Section Options from the Pages panel menu and specify the new page-numbering scheme.
3. Hold down Shift+Ctrl (Windows) or Shift+Command (Mac OS), and then click the object to select it. You can then edit, delete, or manipulate the object.
4. By basing a new master page on an existing master page you create a parent-child relationship between the new master page and the existing one. Any changes you make to the parent master

page are automatically applied to the child master.

4. Working with Objects

Lesson Overview

In this lesson, you'll learn how to do the following:

- Work with layers.
- Create and edit text frames and graphics frames.
- Import graphics into graphics frames.
- Import multiple graphics into a grid of frames.
- Crop, move, and scale graphics.
- Adjust the space between frames.
- Add captions to graphics frames.
- Place and link graphics frames.
- Change the shape of frames.
- Wrap text around an object.
- Create complex frame shapes.
- Convert frame shapes to other shapes.
- Modify and align objects.
- Select and modify multiple objects.
- Create a QR code.

This lesson will take approximately 90 minutes.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the Getting Started section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.

InDesign frames can contain text, graphics, or color. As you work with frames, you'll discover that Adobe InDesign provides you a great amount of flexibility and control over your design.

Getting started

In this lesson, you'll work on a pair of spreads that make up a four-page newsletter. You'll add text and images and make several modifications to the objects on the two spreads.

1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

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2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced. To begin working, you'll open an InDesign document that is already partially completed.
3. Choose File > Open, and open the 04_a_Start.indd file in the Lesson04 folder, located inside

the Lessons folder within the InDesignCIB folder on your hard drive. (If the Adobe Typekit dialog box displays, click Sync Fonts.)

Note

If an alert is displayed when you open the sample document, click Update Links.

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4. Choose File > Save As, rename the file **04_Objects.indd**, and save it in the Lesson04 folder.

Note

As you work through the lesson, move panels or change the magnification to the level that works best for you.

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5. To see what the finished document looks like, open the 04_b_End.indd file in the same folder. You can leave this document open to act as a guide as you work. When you're ready to resume working on the lesson document, choose Window > 04_Objects.indd or click its tab at the top of the document window.

The newsletter that you will work on in this lesson contains two spreads: The spread on the left contains page 4 (the back page on the left) and page 1 (the cover on the right); the spread on the right contains pages 2 and 3 (the center spread). Keep this page arrangement in mind as you navigate from page to page. Here you see the finished newsletter.

Working with layers

Before you begin creating and modifying objects, you should understand how layers work in InDesign. By default, every new InDesign document contains one layer (named Layer 1). You can rename this layer and add more layers at any time as you create a document. Placing objects on different layers lets you organize them for easy selection and editing. In the Layers panel, you can select, display, edit, and print different layers individually, in groups, or all together.

The 04_Objects.indd document has two layers. You'll experiment with these layers to learn how the arrangement of the layers and the placement of objects on layers can affect the design of your document.

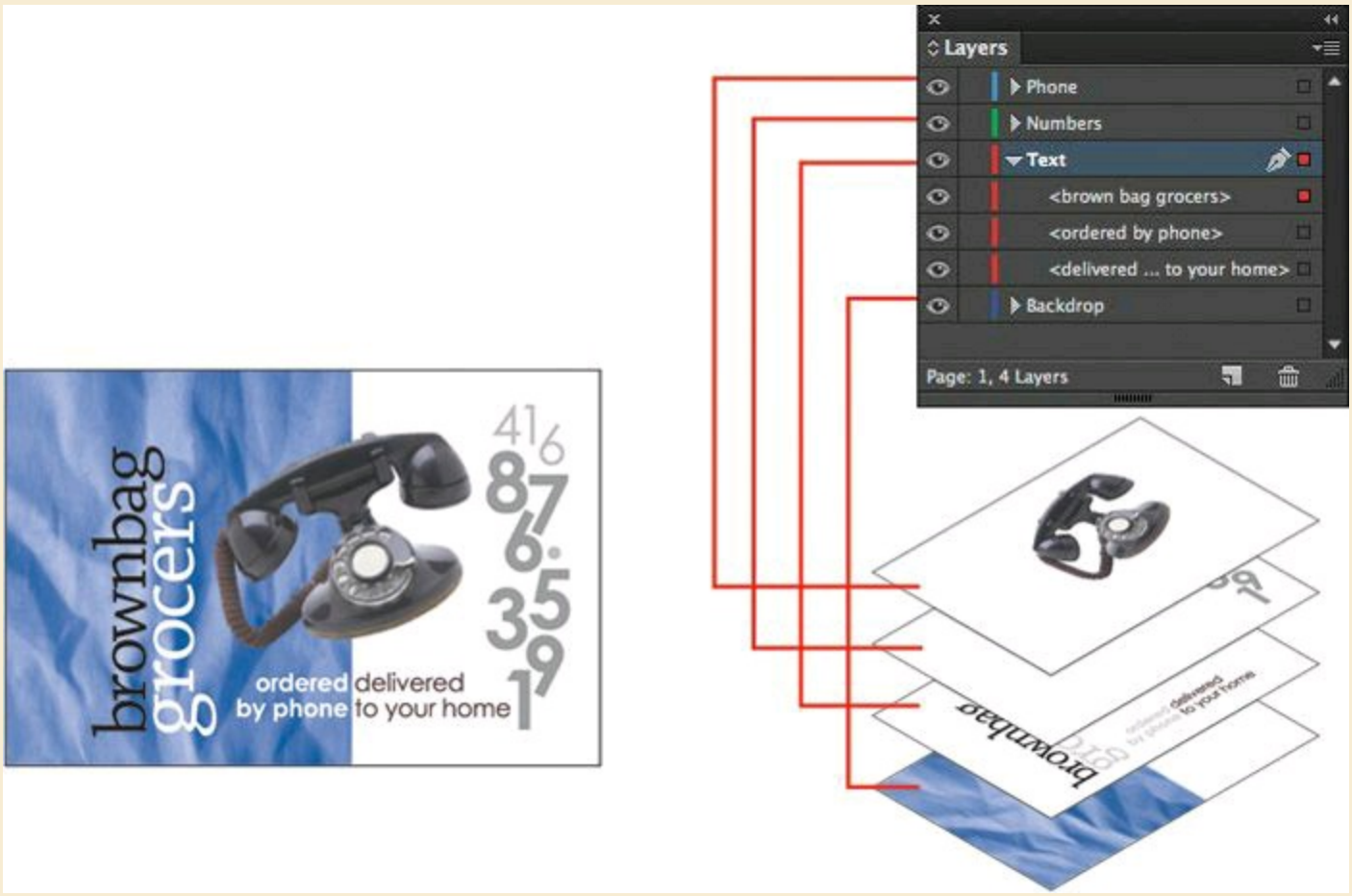
About layers

Think of layers as transparent sheets stacked on top of each other. When you create an object,

you can place it on the layer of your choice, and you can move objects between layers. Each layer contains its own set of objects.

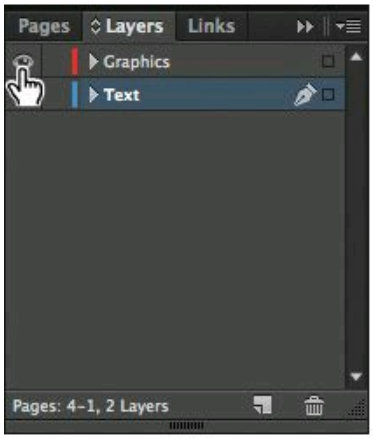
The Layers panel (Window > Layers) displays a list of a document's layers and lets you create, manage, and delete layers. The Layers panel also lets you display the names of all objects on a layer and show, hide, or lock individual objects. Click the triangle to the left of a layer name to alternately display and hide the names of the objects on the layer.

By using multiple layers, you can create and edit specific areas or kinds of content in your document without affecting other areas or kinds of content. For example, if a document prints slowly because it contains many large graphics, you can use one layer for only the text in the document; then, when it's time to proofread the text, you can hide all other layers and quickly print only the text layer. You can also use layers to display alternate design ideas for the same layout or different versions of an advertisement for different regions.

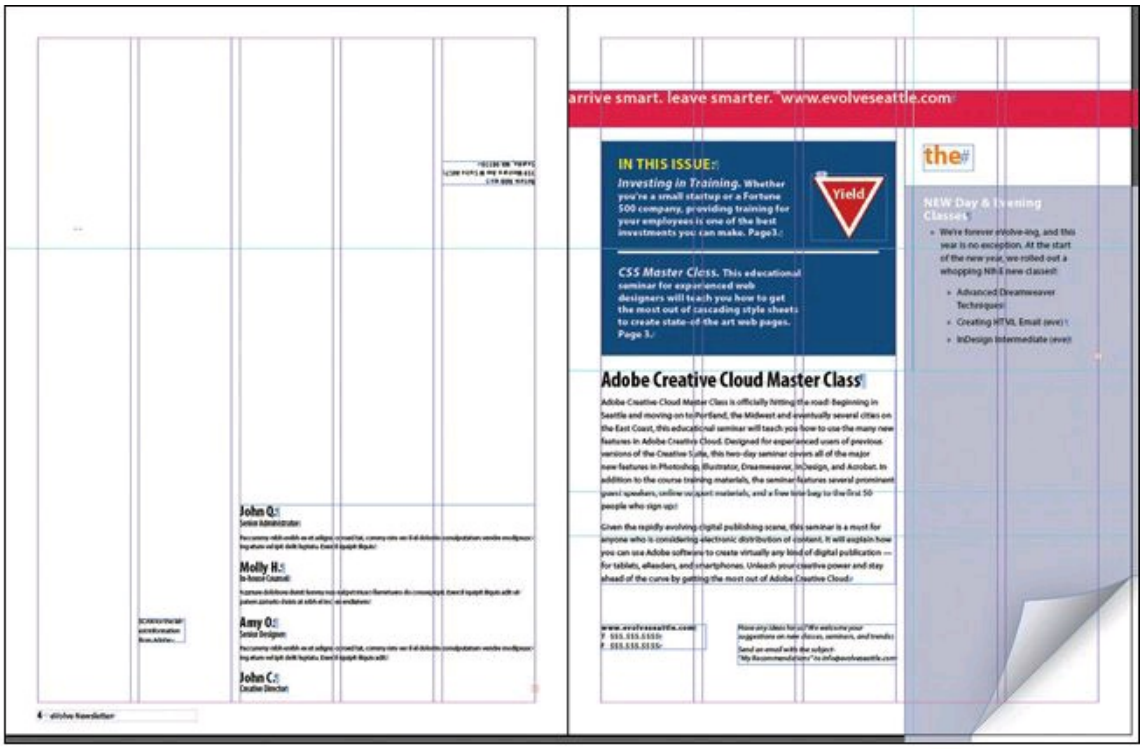


1. Click the Layers panel icon or choose Window > Layers to open the Layers panel.
2. If the Text layer is not selected in the Layers panel, click to select it. The layer is highlighted to indicate that it's selected. Notice that a pen icon ( ) appears to the right of the layer name. The pen icon indicates that this layer is the target layer, and while it's selected anything you import or create is placed on this layer.
3. Click the small triangle to the left of the Text layer name. All of the groups and objects on this layer are now displayed below the layer name. Use the panel's scroll bar to view the names in the list, and then click the triangle again to hide them.
4. Click the eye icon ( ) to the far left of the Graphics layer name. All the objects on the Graphics layer are hidden. The eye icon lets you hide or display individual layers. When you

turn off the visibility of a layer, the eye disappears. Click the empty box again to display the layer contents.



Click to hide layer contents.



The spread with the Graphics layer hidden.

5. Use the Zoom tool ( ) to zoom in on the dark blue frame on the front page (page 1).

6. Using the Selection tool ( ), move the pointer within the Yield sign graphic. Notice the highlighted blue rectangle around the frame. The blue border indicates that the frame is on the Text layer, which has been assigned a blue color. A transparent doughnut shape, otherwise known as the content grabber, is displayed in the center of the frame. When you move the pointer within the content grabber, it changes to a hand.

7. Now move the pointer within the circular graphics frame below the Yield sign. Notice that this frame has a red highlight, the color assigned to the Graphics layer.

Click and drag when the arrow pointer is displayed to move the frame along with the graphic.

Click and drag when the hand pointer is displayed to move only the graphic within the frame.

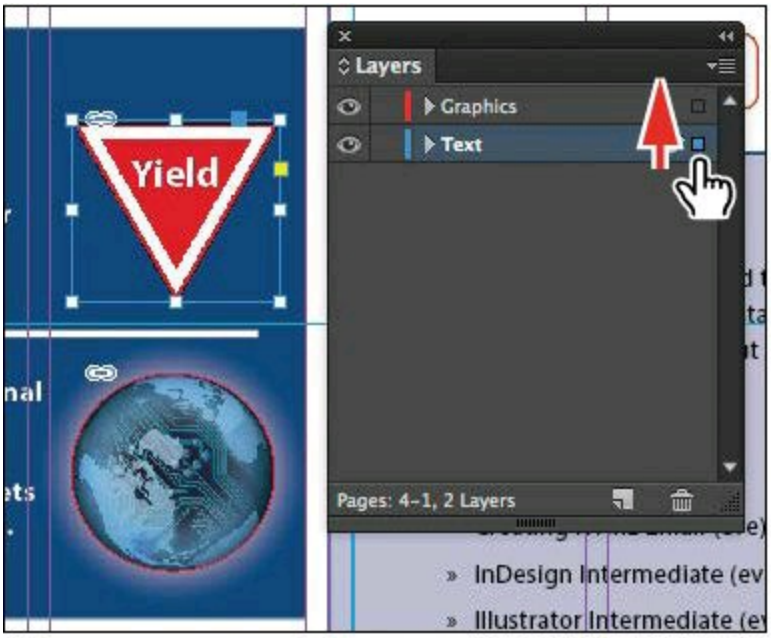
8. Move the pointer back to the frame with the Yield sign, make sure the arrow pointer is displayed, and then click within the graphics frame to select it.

In the Layers panel, you'll notice that the Text layer is selected, and a small blue square appears to the right of the layer name. This indicates that the selected object belongs to this layer. You can move objects from one layer to another by dragging this square between layers in the panel.

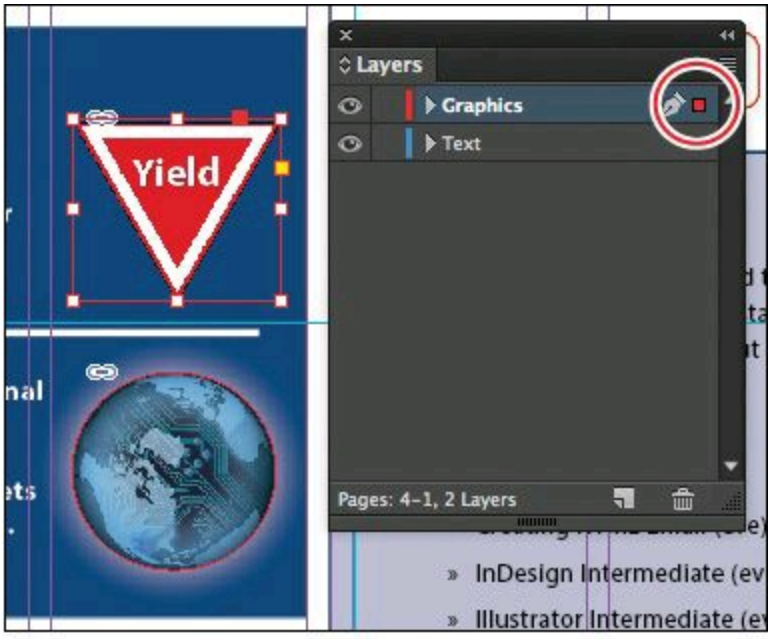
Tip

To see the position of the Yield sign in the Graphics layer relative to other objects in the layer, expand the Graphics layer by clicking the triangle to the left of the layer name.

9. In the Layers panel, drag the small blue square from the Text layer up to the Graphics layer and release the mouse button. The image now belongs to the Graphics layer and is now the topmost object on the top layer.

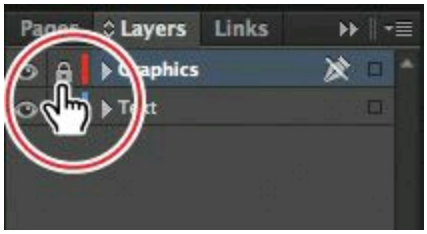


Select the image and drag its icon in the Layers panel.



Result.

10. Click the empty layer lock box to the left of the Graphics layer to lock the layer.



11. Choose View > Fit Spread In Window.

Next, you will make a new layer and move existing content to it.

Tip

If you Alt-click (Windows) or Option-click (Mac OS) the Create New Layer button, the New Layer dialog box opens and lets you name the new layer as part of the layer-creation process.

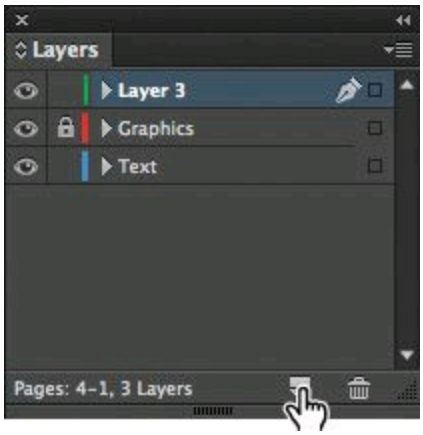
If you Ctrl-click (Windows) or Command-click (Mac OS) the Create New Layer button, a new layer is added below the currently selected layer.

If you Ctrl+Alt-click (Windows) or Command+Option-click (Mac OS) the Create New Layer button, the New Layer dialog box opens. A new layer is placed below the currently selected layer when you close the dialog box.

12. At the bottom of the Layers panel, click the Create New Layer button (). Because the Graphics layer was selected when you created the new layer, the new layer is positioned above the Graphics layer in the Layers panel.

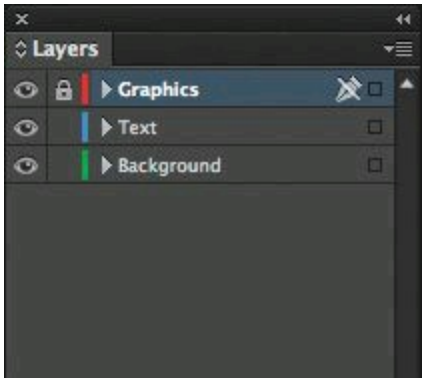
Tip

You can also rename a layer by selecting the layer in the Layers panel and then clicking its name.



13. Double-click the name of the new layer (Layer 3) to open the Layer Options dialog box. Change the name to **Background**, and click OK.

14. In the Layers panel, drag the Background layer to the bottom of the layer stack. A horizontal line appears when you move the pointer below the Text layer, indicating that the layer will be moved to the bottom when you release the mouse button.



15. Choose File > Save.

Using Smart Guides

The Smart Guides feature gives you great flexibility in precisely creating and positioning objects. With Smart Guides, you can snap objects to the edges and centers of other objects, to the vertical and horizontal centers of pages, and to the midpoints of columns and gutters. Plus, Smart Guides appear dynamically as you work to provide instant visual feedback.

You can enable four Smart Guide options in the Guides & Pasteboard preferences (Edit > Preferences > Guides & Pasteboard [Windows] or InDesign > Preferences > Guides & Pasteboard [Mac OS]):

- **Align To Object Center.** Causes object edges to snap to the center of other objects on a

page or spread when you create or move an object.

- **Align To Object Edges.** Causes object edges to snap to the edge of other objects on a page or spread when you create or move an object.
- **Smart Dimensions.** Causes the width, height, or rotation of an object to snap to the dimensions of other objects on a page or spread when you create, resize, or rotate an object.
- **Smart Spacing.** Lets you quickly arrange objects so that the space between them is equal.

The Smart Guides command (View > Grids & Guides > Smart Guides) lets you turn Smart Guides on and off. You can also enable/disable Smart Guides from the View Options menu in the Application bar. Smart Guides are enabled by default.

To familiarize yourself with Smart Guides, create a new multicolumn one-page document. (In the New Document dialog box, specify a value greater than 1 in the Columns Number field.)

1. In the Tools panel, select the Rectangle Frame tool (). Click the left margin guide and drag to the right. As the pointer moves across the page, notice that a guide is displayed when the pointer reaches the middle of a column, the midpoint within a gutter, and the horizontal center of the page. Release the mouse button when a Smart Guide appears.
2. With the Rectangle Frame tool still selected, click the top margin guide and drag downward. Notice that when the pointer reaches the top edge, center, and bottom edge of the first object you created, as well as the vertical center of the page, a Smart Guide appears.
3. In an empty area of the page, create one more object with the Rectangle Frame tool. Drag the mouse slowly and watch carefully. Smart Guides appear when the pointer reaches the edge or center of any of the other objects. Also, when the height or width of the new object equals the height or width of either of the other two objects, a vertical or horizontal (or both) line with arrows at both ends appears next to the object you're creating and the object with the matching height or width.
4. Close the document without saving changes.

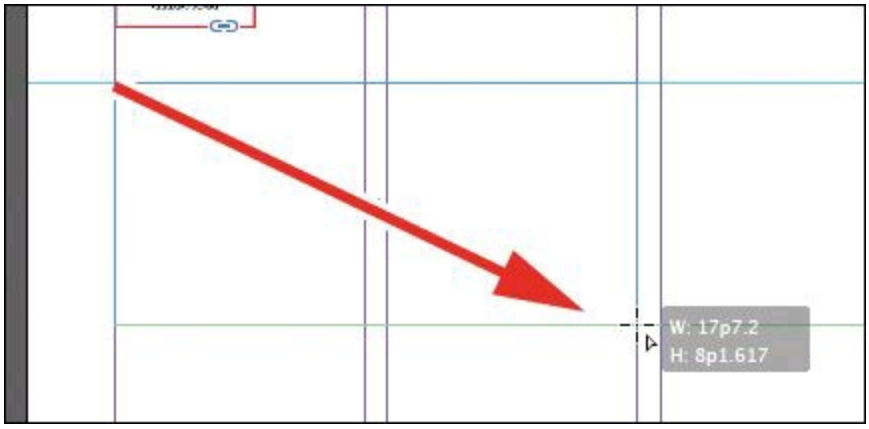
Creating and modifying text frames

In most cases, text is placed inside a frame. (You can also use the Type On A Path tool [] to flow text along a path.) The size and location of a text frame determine where the text appears on a page. Text frames can be created with the Type tool and modified using a variety of tools—as you'll do in this part of the lesson.

Creating and resizing text frames

Now you'll create your own text frame, adjust its size, and then resize another frame.

1. In the Pages panel, double-click the icon for page 4 to center it in the document window.
2. In the Layers panel, click the Text layer to select it. Any content created when the Text layer is selected will be placed on that layer.
3. Select the Type tool () in the Tools panel. Position the pointer where the left edge of the first column meets the horizontal guide at 22p0 on the vertical ruler. Drag to create a frame that snaps to the right edge of the second column and has a height of about 8p.



4. Use the Zoom tool ( ) to magnify the text frame, then select the Type tool.

5. In the new text frame, type **Customer**, press Shift+Enter (Windows) or Shift+Return (Mac OS) to create a forced line break (without creating a new paragraph), and then type **Testimonials**. Click anywhere within the text to select the paragraph.

   Now you'll apply a paragraph style to the text.

Tip

It isn't necessary to highlight an entire paragraph before applying a paragraph style to it. You can select a paragraph by clicking anywhere within it.

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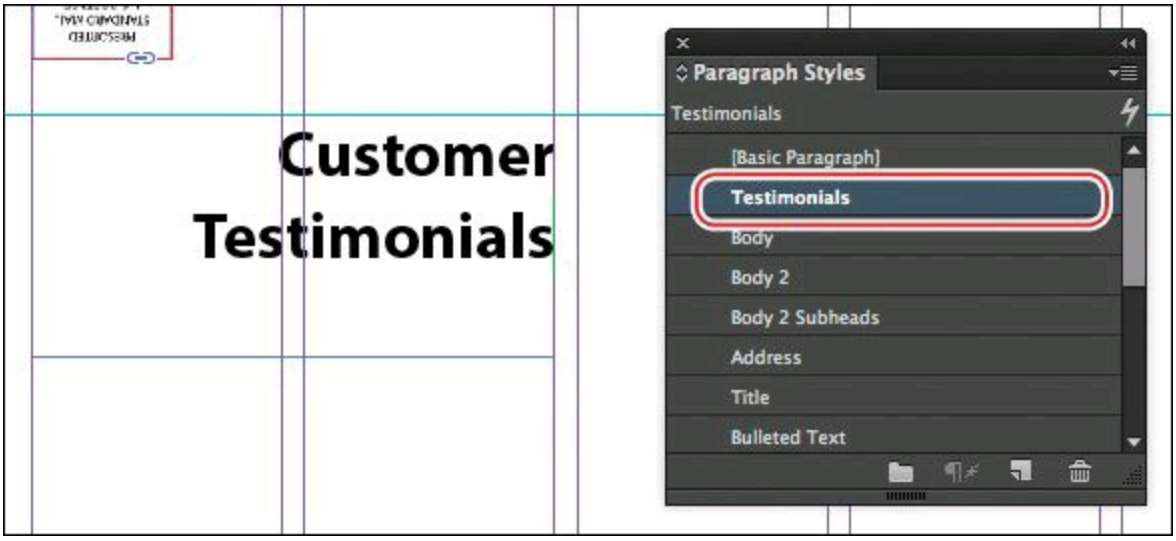
6. Click the Paragraph Styles panel icon or choose Type > Paragraph Styles to open the panel. Click the style named Testimonials to apply it to the selected paragraph.



   Read more about styles in Lesson 9, "Working with Styles."

7. Using the Selection tool ( ), double-click the bottom center handle of the selected text frame to fit the frame to the text vertically.

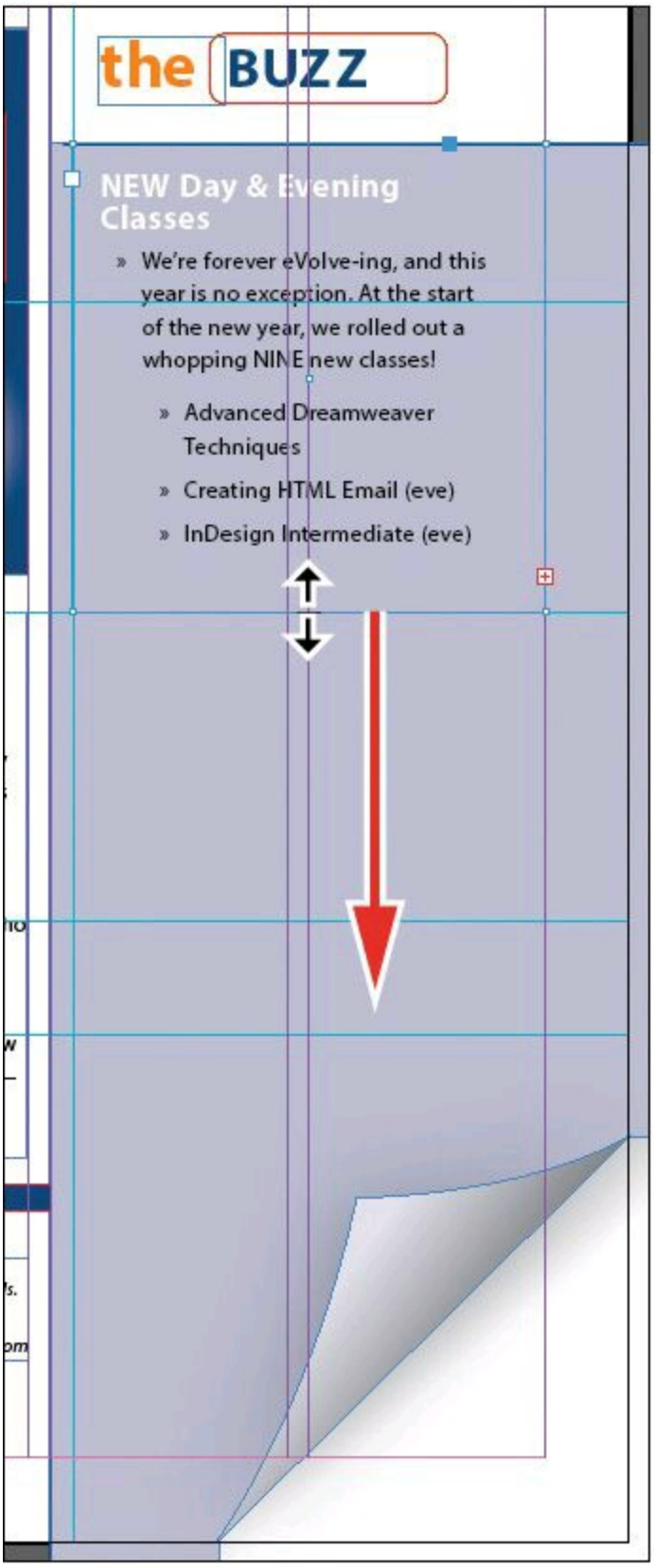
Double-click to fit the frame to its content.

Result.

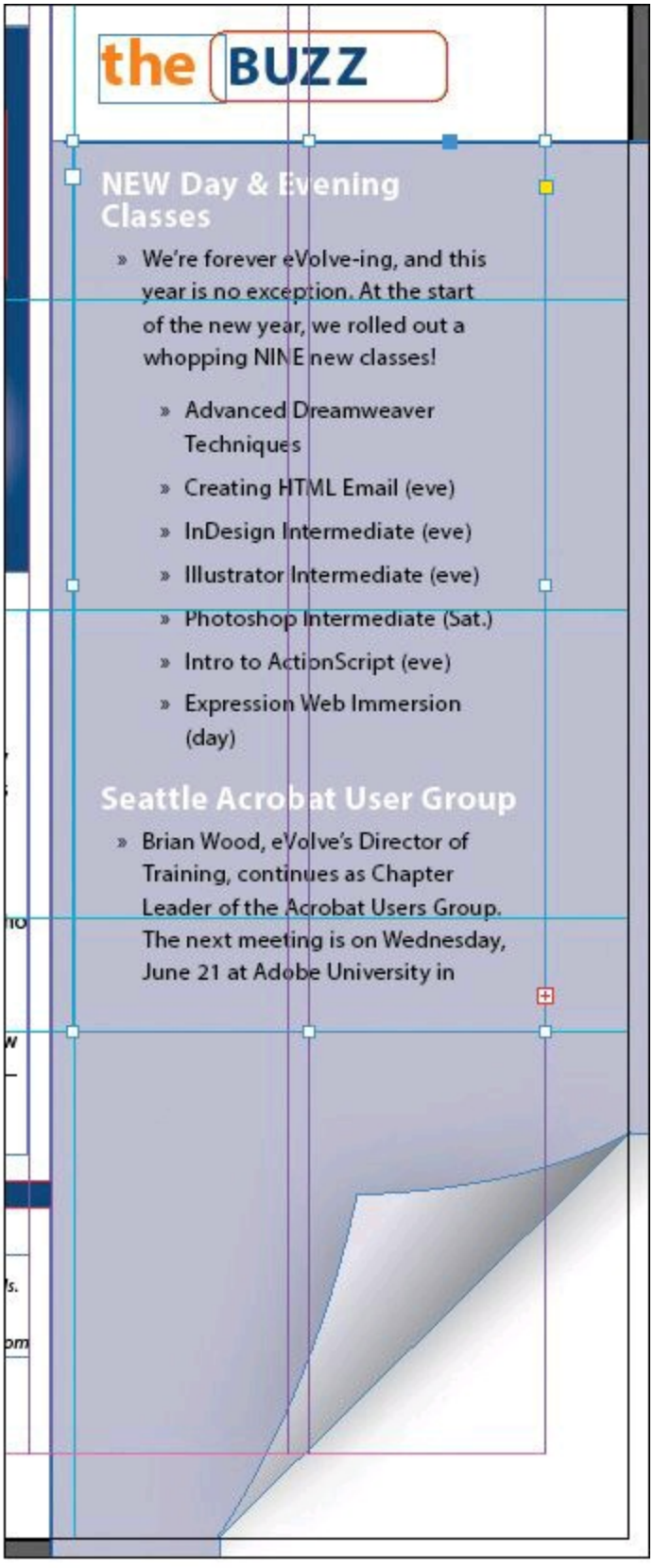
8. Choose View > Fit Spread In Window, and then press Z to temporarily access the Zoom tool, or select the Zoom tool ( ) to magnify the rightmost column on the front page (page 1). Use the Selection tool ( ) to select the text frame below "the BUZZ" text. The frame contains the text "NEW Day & Evening Classes."

The red plus sign (+) at the lower-right corner of the text frame indicates that the frame contains overset text. Overset text is not visible because the frame is too small to display it. You'll fix this by changing the size and shape of the text frame.

9. Drag the center bottom handle of the selected text frame downward to resize the height of the frame until the bottom edge snaps to the ruler guide at 48p0 on the vertical ruler. When the pointer approaches the ruler guide, the arrows change in appearance from black to white, indicating that the frame edge is about to snap to the guide.



Resize the frame by dragging the center point.



Result.

10. Choose Edit > Deselect All, and then choose File > Save.

Reshaping a text frame

So far, you've resized a text frame with the Selection tool by dragging a handle. Now you'll reshape the frame using the Direct Selection tool to move one of the frame's anchor points.

Tip

To resize a text frame and the text characters inside it simultaneously, select the frame, and then double-click the Scale tool (), which is combined with the Free Transform, Rotate, and Shear tools in the Tools panel, and specify values in the Scale dialog box or hold down Ctrl (Windows) or Command (Mac OS) as you drag a text frame handle with the Selection tool. Add the Shift key as you drag to maintain the proportion of the text and frame.

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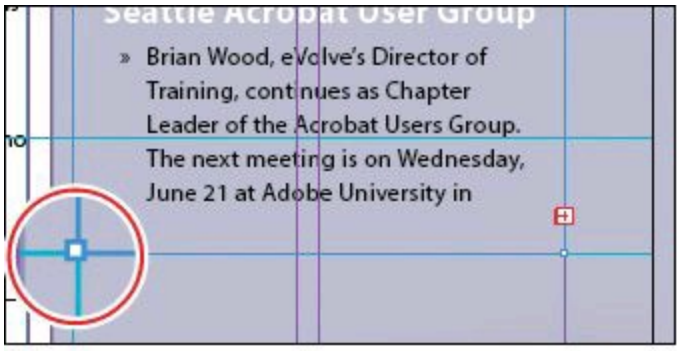
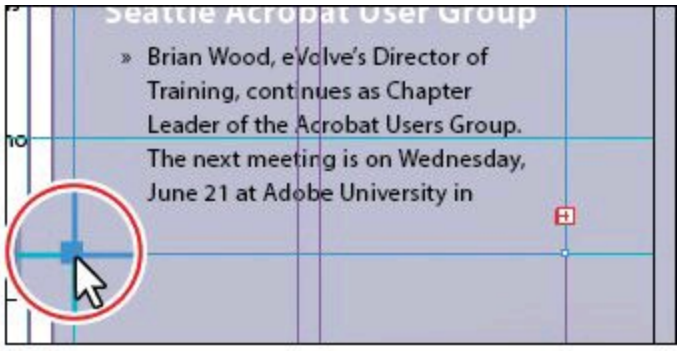
1. In the Tools panel, select the Direct Selection tool (), and then click within the text frame you just resized. Four very small anchor points now appear at the corners of the selected text frame. The anchor points are all hollow, indicating that none of them is selected.

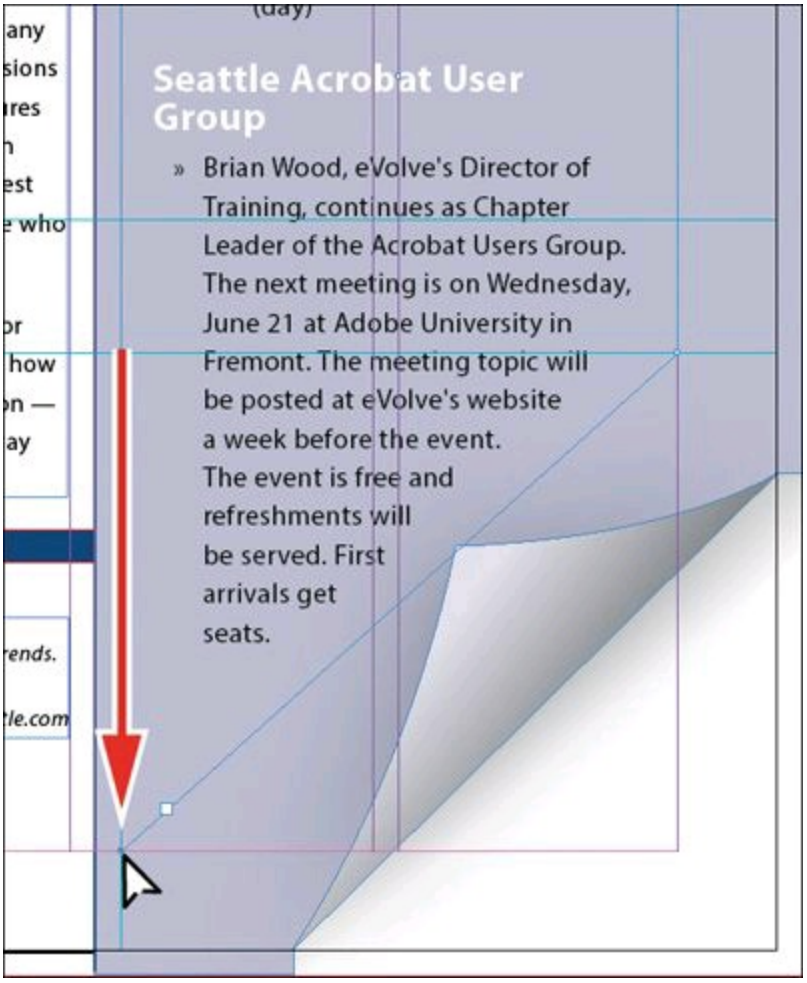


Unselected anchor point.



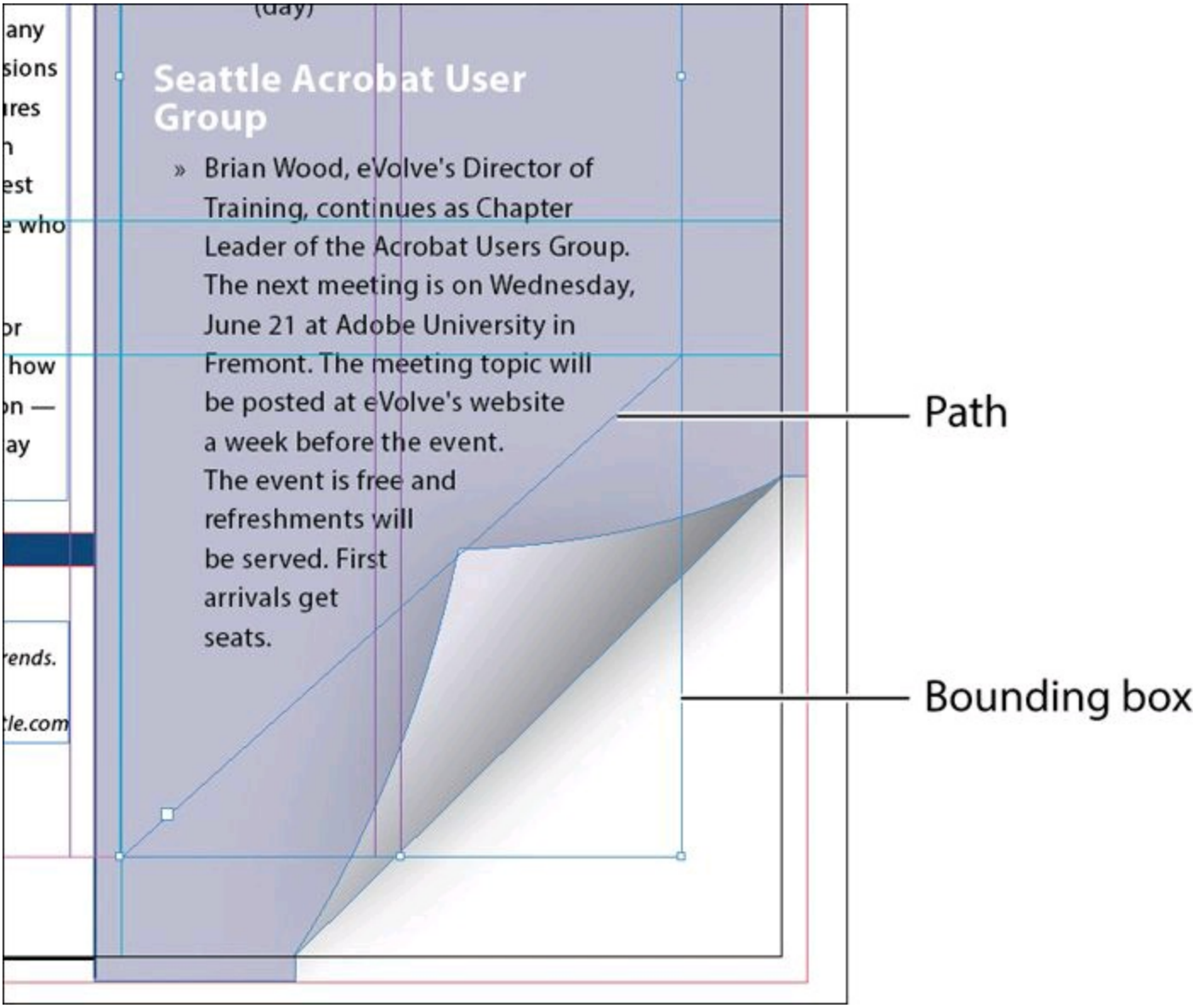
Selected anchor point.

2. Select the anchor point at the lower-left corner of the text frame, pause for a moment until the arrow pointer turns black, and then drag it straight down until the point touches the margin guide at the bottom of the page, and then release the mouse button. As you drag, the text is simultaneously reflowed to give you a real-time view. After you release the mouse button, notice that the overset text indicator (the red plus sign) is no longer displayed, and all of the story's text is now visible.



Be sure to drag only the anchor point—if you drag just above or to the right of the anchor point, you'll move other corners of the text frame, too. If you accidentally move the frame, choose Edit > Undo Move and try again.

3. Press the V key to switch to the Selection tool.

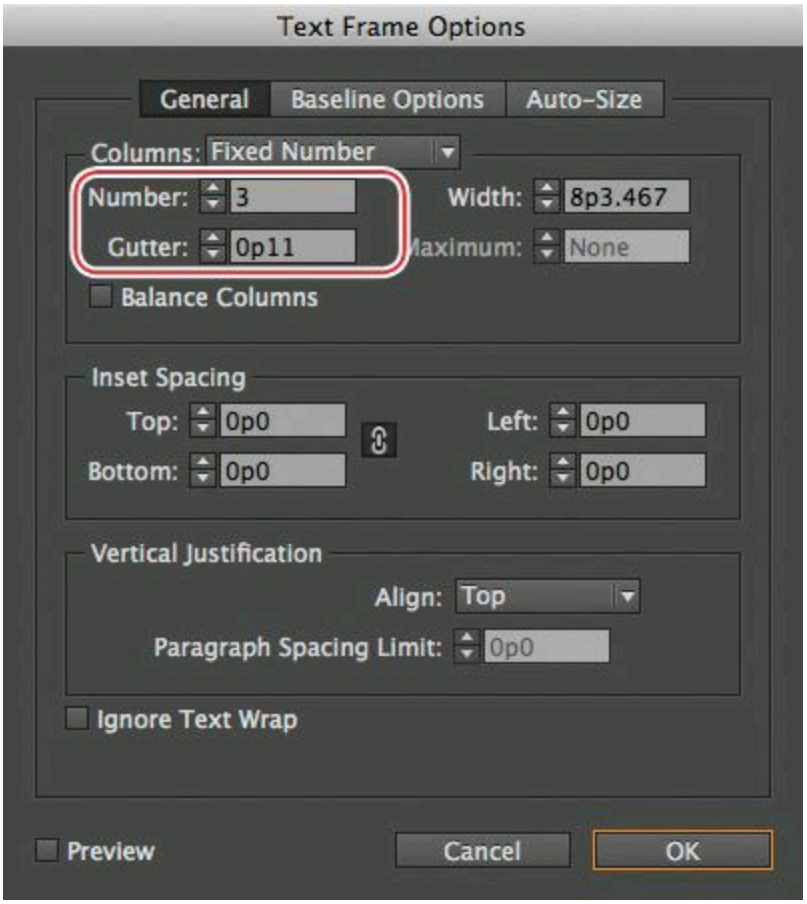


4. Deselect all objects, and then choose File > Save.

Creating multiple columns

Now you'll take an existing text frame and convert it to a multiple-column text frame.

1. Choose View > Fit Spread In Window, and then use the Zoom tool ( )to display the lower-right portion of the back page (page 4). Use the Selection tool ( ) to select the text frame that begins with "John Q."
2. Choose Object > Text Frame Options. In the Text Frame Options dialog box, type **3** in the Number box and **p11** (11 points) in the Gutter box if necessary. The gutter controls the distance between the columns. Click OK.



3. To begin each column with a heading, select the Type tool ( ), place the insertion point in front of the name "Amy O.," and then choose Type > Insert Break Character > Column Break. This forces "Amy O." to the top of the second column. Insert a column break before the name "Jeff G."

Tip

You can also display hidden characters by choosing Hidden Characters from the View Options menu in the Application bar.

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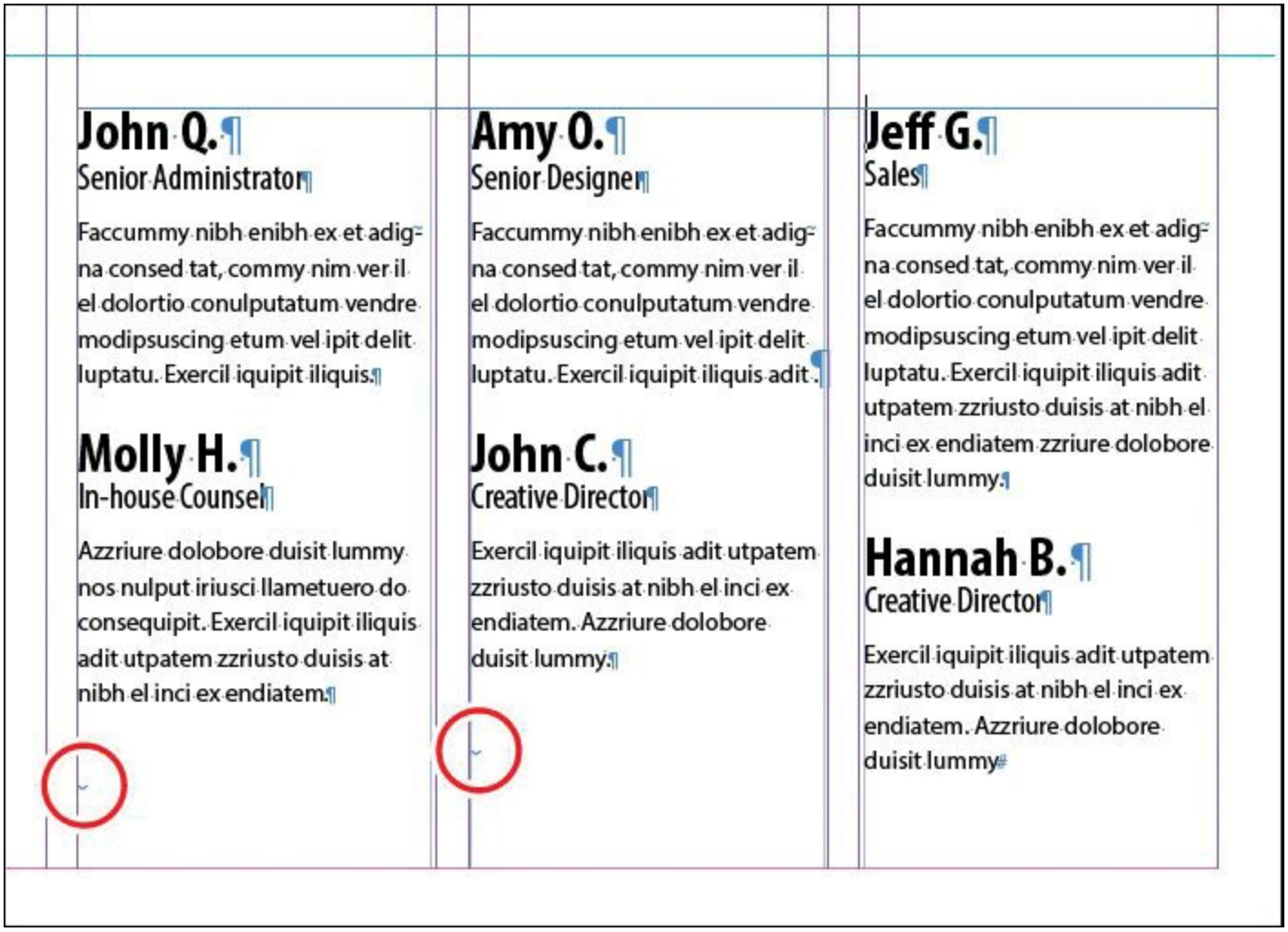
4. Choose Type > Show Hidden Characters to see the break characters. (If Hide Hidden Characters is displayed—rather than Show Hidden Characters—at the bottom of the Type menu, hidden characters are already showing.)



The red circles indicate the Column Break characters.

5. Choose Type > Hide Hidden Characters.

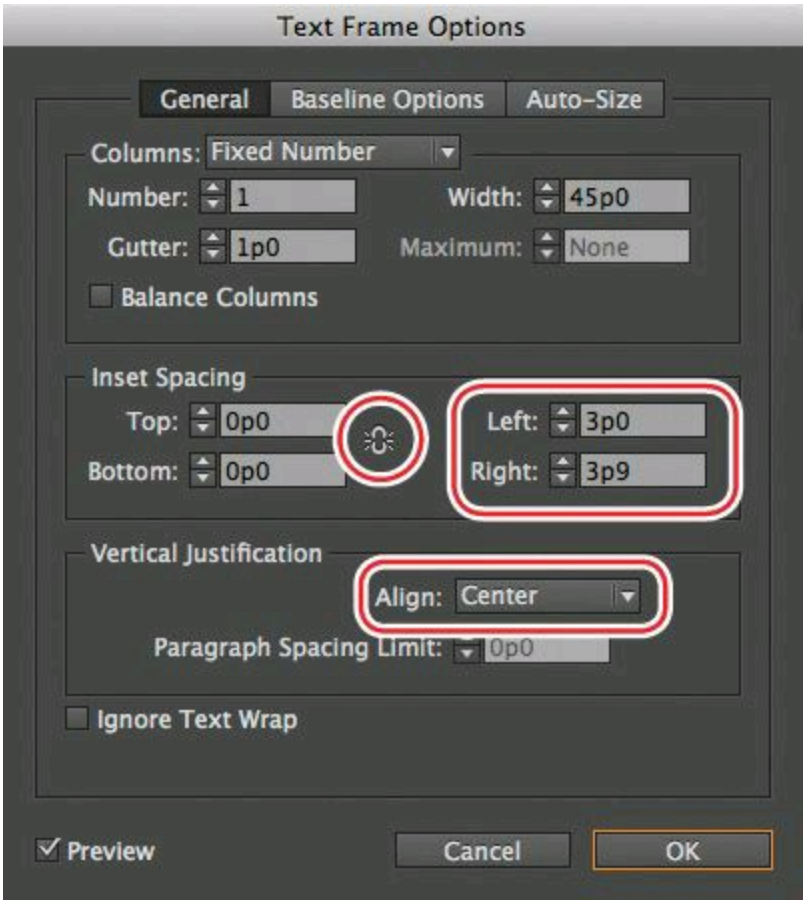
Adjusting text inset and vertical alignment

You'll now finish the red title bar on the cover by fitting the text nicely into the frame. By adjusting the space between the edge of the frame and the text, you make the text easier to read.

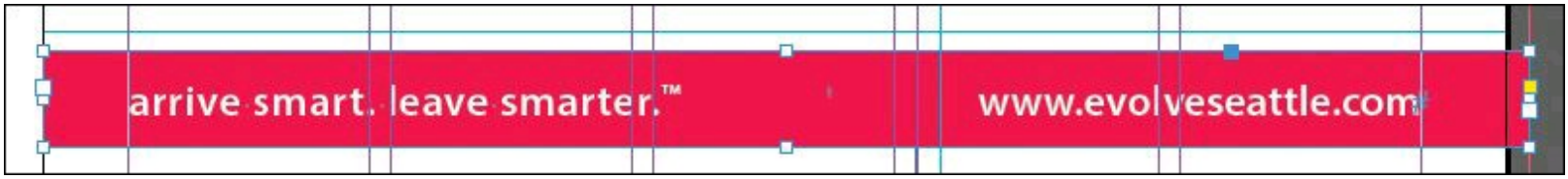
1. Choose View > Fit Spread In Window, and then use the Zoom tool ( ) to magnify the red text frame near the top of the front page (page 1) with the text "arrive smart. leave smarter." Select the Selection tool ( ), and then select the red text frame.

2. Choose Object > Text Frame Options. If necessary, drag the Text Frame Options dialog box aside so that you can still see the selected text frame as you set options.
3. In the Text Frame Options dialog box, make sure that the Preview option is selected. Then, in the Inset Spacing section, click the Make All Settings The Same icon ( ) to disable it so that you can change the Left setting independently. Change the Left value to **3p** to move the left margin of the text frame 3 picas to the right and away from the left edge of the frame, and then change the Right value to **3p9**.

4. In the Vertical Justification section of the Text Frame Options dialog box, choose Center from the Align menu. Click OK.



5. Select the Type tool (T), and then click to the left of "www.evolveseattle.com" to establish an insertion point. To move the URL text so that it aligns with the right inset you specified earlier, choose Type > Insert Special Character > Other > Right Indent Tab.



6. Choose Edit > Deselect All, and then choose File > Save.

Creating and modifying graphics frames

Now you're ready to add the company logo and the employees' images to the spread. In this section, you'll focus on different techniques for creating and modifying graphics frames and their contents.

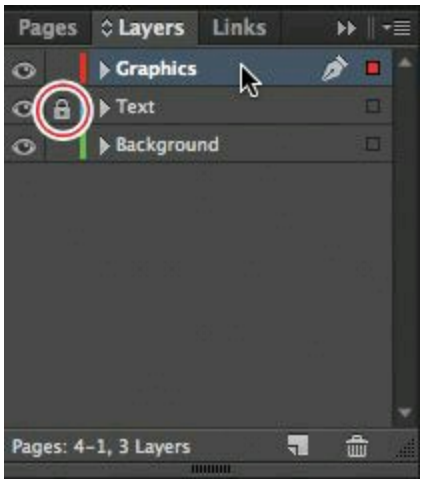
Because you'll be working on graphics rather than text, your first step is to make sure that the graphics appear on the Graphics layer rather than on the Text layer. Isolating objects on different layers streamlines your workflow and makes it easier to find and edit elements of your design.

Drawing a new graphics frame

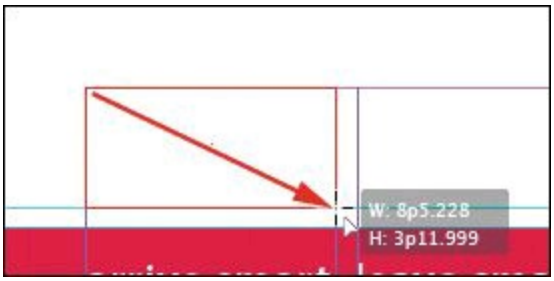
To begin, you'll create a frame for the logo at the top of the cover page (the recto page in the first spread).

1. If the Layers panel is not visible, click the Layers panel icon or choose Window > Layers.
2. In the Layers panel, click the lock icon () to unlock the Graphics layer. Lock the Text layer by clicking the box to the left of the layer name. Select the Graphics layer by clicking the name of

the layer so that the new elements are assigned to this layer.



3. Choose View > Fit Spread In Window, and then use the Zoom tool ( ) to zoom in on the upper-left corner of the front page (page 1).
4. In the Tools panel, select the Rectangle Frame tool ( ). Move the pointer to the corner where the top and left margin guides intersect and drag down until the pointer reaches the horizontal guide, and then across to the right edge of the first column.



Drag to create a graphics frame.

5. Switch to the Selection tool ( ) and make sure that the graphics frame is still selected.

Placing a graphic within an existing frame

Now, you'll place the company logo within the selected frame.

Note

If a graphics frame isn't selected when you place an image, the pointer changes to the loaded graphics icon ( ). In this case, you could click within the frame to place the image.

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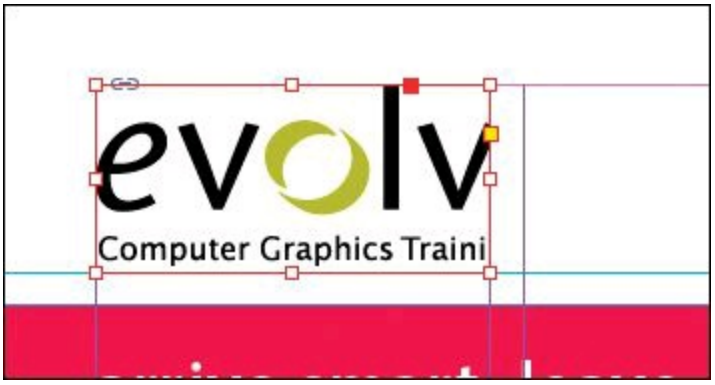
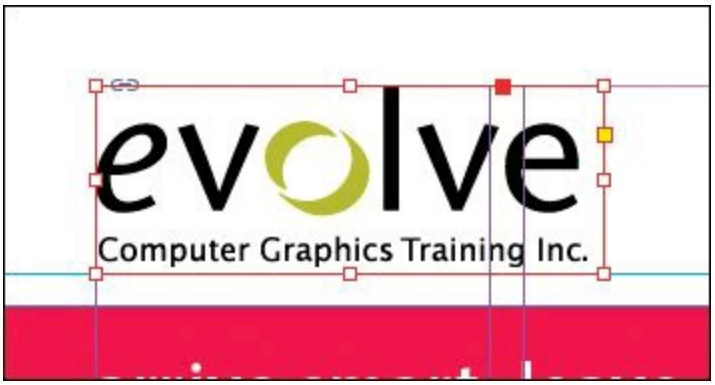
1. Choose File > Place and then double-click logo_paths.ai in the Links folder in the Lesson04 folder. The image appears in the graphics frame.
2. To ensure that the graphic is displayed at the highest possible resolution, choose Object > Display Performance > High Quality Display.



Resizing a graphics frame to crop a graphic

The graphics frame you created isn't quite wide enough to show the entire logo, so you'll widen it to reveal the hidden portion.

1. Using the Selection tool ( ), drag the center-right handle until the entire logo is visible. If you pause before you drag, you'll be able to see the cropped portion of the image as you drag and easily determine when the frame edge is beyond the edge of the logo. Make sure you drag the small, white handle and not the larger, yellow one. The yellow handle lets you add corner options, and you'll learn more about them later in this lesson.



2. Choose Edit > Deselect All, and then choose File > Save.

Placing a graphic without an existing frame

The design of the newsletter uses two versions of the logo—one on the front cover and one on the back cover. You could simply use the logo you just placed and the Copy and Paste commands (Edit menu) to add the logo to the back cover, and you'll do that later in this lesson, but instead you'll import the logo graphic without first creating a graphics frame.

1. Choose View > Fit Spread In Window, and then use the Zoom tool ( ) to display the upper-right quarter of the back page (page 4).
2. Choose File > Place and then double-click logo_paths.ai in the Links folder in the Lesson04 folder. The pointer changes to a loaded graphics icon ( ).

Tip

If you click—rather than click and drag—on an empty area of the page when you place an image, the image is placed at 100 percent of its original size. The upper-left corner of the image is placed where you click.

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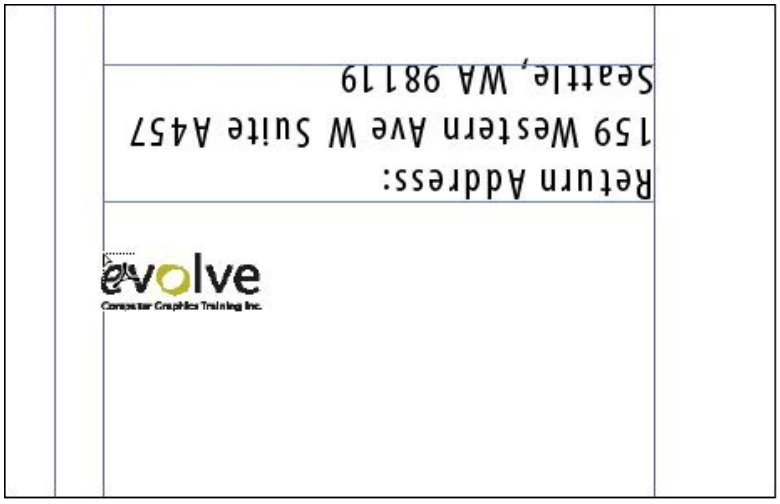
3. Position the loaded graphics icon ( ) at the left edge of the rightmost column slightly below the rotated text frame that contains the return address, drag until the pointer reaches the right edge of the column, and then release the mouse button. Notice that as you drag, a rectangle is displayed. This rectangle is proportional to the logo image.



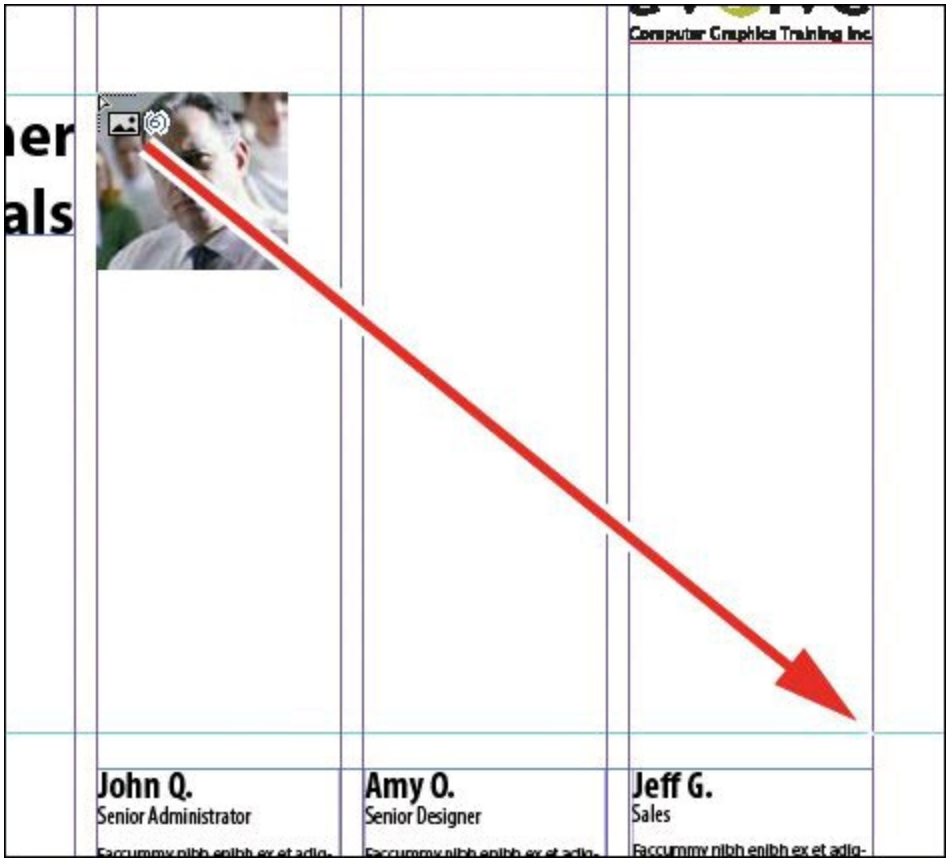
You don't need to resize the frame as you did earlier because the frame already shows the entire image. The graphic still needs to be rotated, but you'll do that later in the lesson.

4. Choose Edit > Deselect all, and then choose File > Save.

Placing multiple graphics in a grid of frames

The back cover of the newsletter should contain six photos. You could place the photos one by one and then position each one individually, but because they will be arranged in a grid, you can place all the photos and arrange them in a grid at the same time.

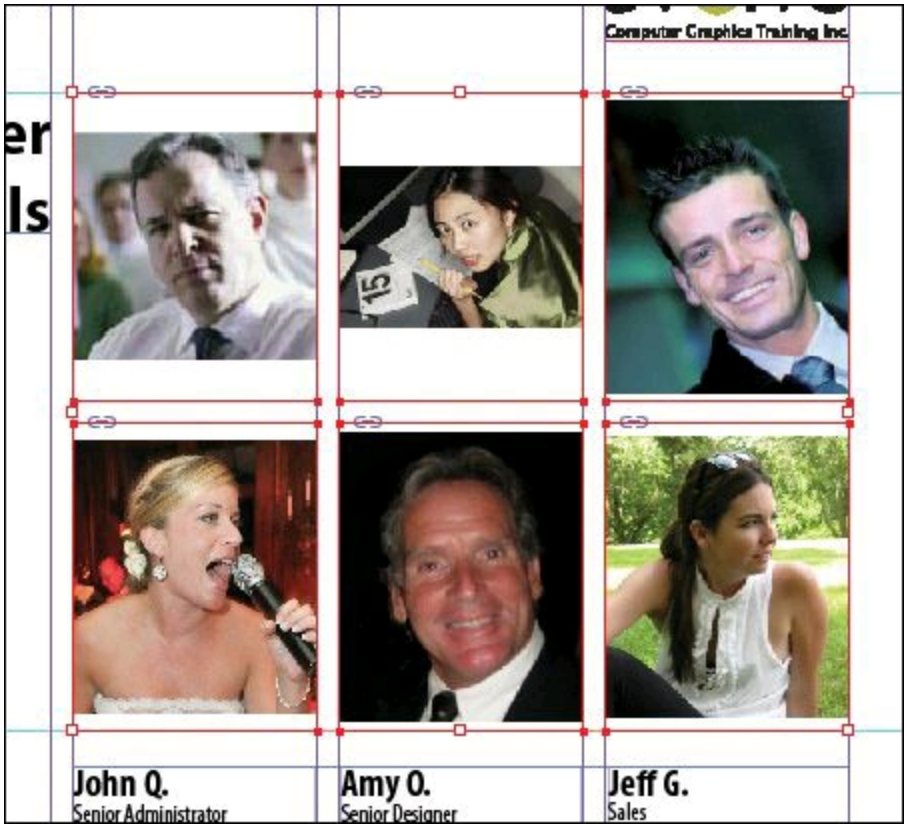
1. Choose View > Fit Spread In Window.
2. Choose File > Place. Navigate to the Links folder in the Lesson04 folder, click the graphic file named 01JohnQ.tif to select it, and then press Shift and click the file named 06HannahB.tif to select all six photos. Click Open.
3. Position the loaded graphics icon ( ) at the intersection of the horizontal ruler guide in the top half of the page and the left edge of the third column.



Tip

When using any of the frame creation tools (Rectangle, Polygon, Type, and so on), you can create multiple and equally spaced frames by using the same arrow key gestures as you drag with the tool.

4. Drag down and toward the right margin. As you drag, press the Up Arrow key once and the Right Arrow key twice. As you press the arrows, the proxy image changes to a grid of rectangles to indicate the layout of the grid.
5. Continue dragging until the pointer snaps to the intersection of the right margin guide and the lower horizontal ruler guide, and then release the mouse. A grid of six graphics frames displays the six photos you placed.



6. Choose Edit > Deselect All, and then choose File > Save.

Resizing and moving images within frames

Now that you've placed the six photos, you need to resize and reposition them so that they fill the graphics frames and are cropped correctly.

The image and the frame for any placed graphic are separate elements. Unlike text frames, a graphics frame and its content each has its own bounding box. Resizing the image (without resizing the frame) is exactly like resizing the frame and the image together, except that you first select the image's bounding box before resizing it.

1. Using the Selection tool ( ), position the pointer over the content grabber within the image of John Q. (the top-left photo). When the pointer is within the content grabber, a hand icon ( ) is displayed. Click to select the frame's contents (the image itself).

Before clicking.

Result.

Tip

When resizing an image with the Selection tool, press Shift+Alt (Windows) or Shift+Option (Mac OS) to size the image proportionately from the center outward.

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2. While holding down the Shift key, drag the center bottom handle to the bottom edge of the graphics frame. Do the same with the center top handle and drag it to the top edge of the frame. The Shift key maintains the proportions of the graphic so that it is not distorted. If you pause briefly before you start dragging, you'll see a ghosted image of the cropped areas of the graphic contents, a feature called Dynamic Preview.

Tip

Bitmap images resized more than 120 percent of their original size may not contain enough pixel information for high-resolution offset printing. Check with your print service provider if you're unsure of the resolution and scaling requirements for any documents you plan to have printed.

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3. Make sure that the image entirely fills the graphics frame.
4. Repeat steps 1–3 for the remaining two photos in the top row.

You'll use a different method to resize the other three photos.

5. Select the graphic on the left of the second row. You can select either the frame or its content.

Tip

You can also access the fitting commands from the context menu by right-clicking (Windows) or Control-clicking (Mac OS).

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6. Choose Object > Fitting > Fill Frame Proportionally. This increases the scale of the graphic so that the frame is filled. Small portions of the graphic are now cropped by the left and right edges of the frame.
7. Repeat steps 5 and 6 for the remaining two photos in the bottom row.

8. Choose Edit > Deselect All, and then choose File > Save.

Tip

If you enable the Auto-Fit option for a graphics frame, the image within will automatically resize when you resize the frame. To enable Auto-Fit for a selected graphics frame, choose Object > Fitting > Frame Fitting Options, and then select Auto-Fit or select Auto-Fit in the Control panel.

You can simultaneously resize a graphics frame and its content by selecting the frame (rather than the content) and holding down Shift+Ctrl (Windows) or Shift+Command (Mac OS) as you drag a handle of the frame. The Shift key maintains the proportions of the bounding box so that the graphic is not distorted. Using the Shift key is optional if distorting the graphic doesn't matter to your design.

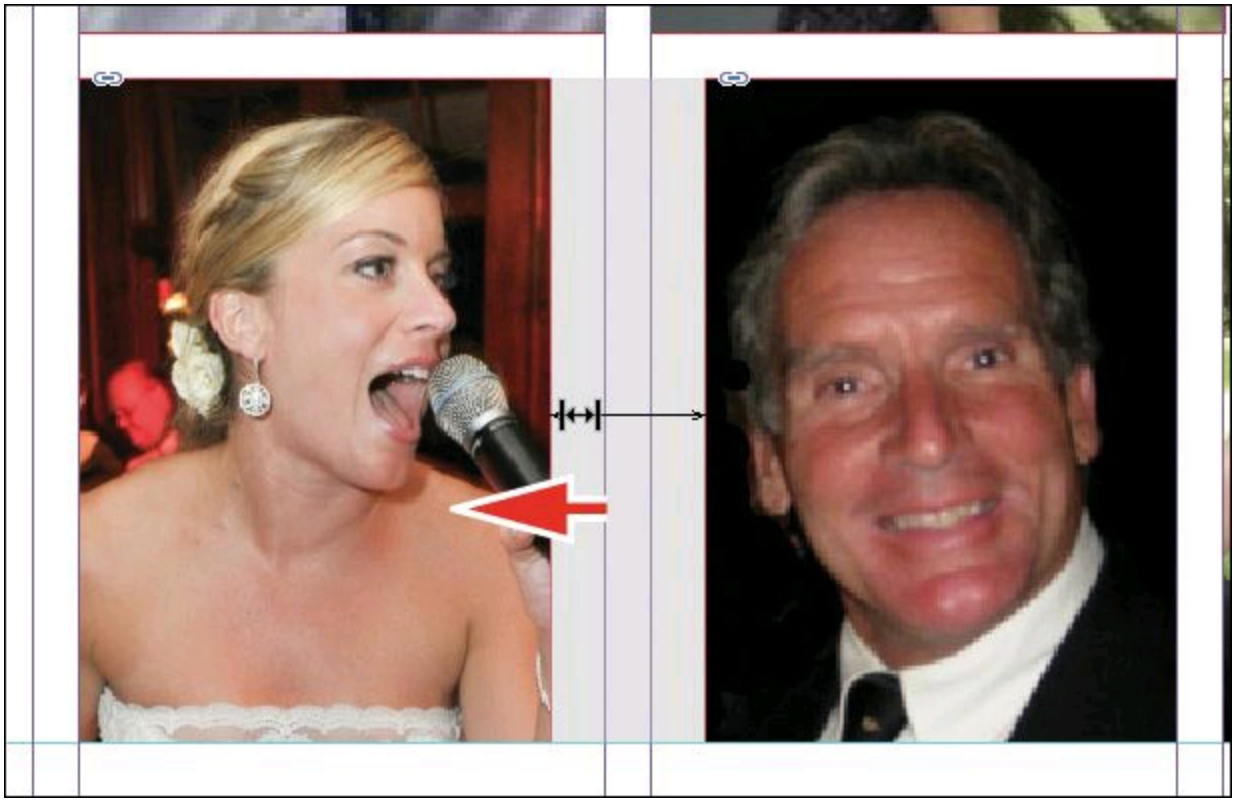
Next, you're going to adjust the space between some of the photos to give the grid arrangement a visual tweak.

Adjusting the space between frames

The Gap tool ( ) lets you select and adjust the space between frames. You'll use it to adjust the space between two of the photos in the top row and then two of the photos in the bottom row.

1. Choose View > Fit Page In Window. Hold down the Z key to temporarily access the Zoom tool ( ), zoom in on the two photos at the top right, and then release the Z key to return to the Selection tool.
2. Select the Gap tool ( ), and then move the pointer into the vertical gap between the two pictures. The gap is highlighted—all the way down to the bottom of the two photos below.
3. Hold down the Shift key and drag the gap one gutter width to the right, making the graphics frame on the left one gutter width wider and the one on the right one gutter width narrower. (If you don't hold Shift while dragging, you'll move the gap between the two photos below as well.)

4. Choose View > Fit Page In Window. Press Z to temporarily access the Zoom tool, and then zoom in on the two photos on the bottom left.
5. With the Gap tool, move the pointer to the vertical gap between the two pictures. Press Shift+Ctrl (Windows) or Shift+Command (Mac OS), and then drag to widen the gap from one gutter width to approximately three gutter widths. (You may have to drag left or right depending on which graphic you click closest to.) It's important to release the mouse button before releasing the keys.



6. Choose View > Fit Page In Window, and then choose File > Save.

You've completed the grid of images on the back page (page 4).

Adding metadata captions to graphics frames

You can automatically generate captions for placed graphics based on metadata information stored in the original graphics files. Next, you'll automatically add photographer credits to the pictures using metadata information.

Tip

If Adobe Bridge is installed on your computer, the Metadata panel lets you easily edit metadata for images and see metadata associated with images.

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1. With the Selection tool ( ), Shift-click to select the six graphics frames.

Tip

You can also open the Caption Setup dialog box by choosing Object > Captions > Caption Setup.

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2. Click the Links panel icon and choose Captions > Caption Setup from the panel menu.
3. In the Caption Setup dialog box, specify the following settings:
   - In the Text Before box, type **Photo by**. (Make sure to enter a space character after **by**. Don't add a period after the space character.)
   - Choose Author from the Metadata menu; leave the Text After box blank.
   - Choose Below Image from the Alignment menu.
   - Choose Photo Credit from the Paragraph Style menu.
   - In the Offset box enter **p2**.

4. Click OK to save the settings and close the Caption Setup dialog box.
5. From the Links panel menu, choose Captions > Generate Static Captions.

Each of the graphic files contains a metadata element named "Author," which stores the name of the photographer. This metadata information is used when the photo credit caption is generated.

Tip

InDesign lets you create either static captions, which generate caption text from a graphic's metadata and must be updated manually, or live captions, which are variables that retain links to a graphic's metadata and can be automatically updated.

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6. Choose Edit > Deselect All, and then choose File > Save.

Placing and linking graphics frames

The two imported graphics on the cover page within the "IN THIS ISSUE" frame are used again on page 3 of the newsletter to accompany articles. Next, you'll use the Place and Link feature to create copies of these two graphics and place them on page 3.

Tip

In addition to placing and linking objects within a document, you can place and link objects between documents.

Unlike the Copy and Paste commands, which simply create a duplicate of the original object, the Place and Link feature creates a parent-child relationship between the original object and the copy. If you make changes to the parent object, you have the option to update the child object.

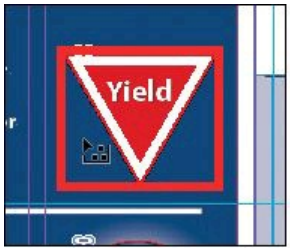
1. Choose View > Fit Spread In Window.

Tip

You can also add objects to the Content Conveyor panel by selecting them and then choosing Edit > Place And Link.

2. Select the Content Collector tool ( ). Notice that an empty Content Conveyor panel is now displayed at the bottom of the window.

3. Move the pointer over the Yield sign graphic on page 1. Notice that a heavy red border is displayed around the image, indicating that this graphics frame is on the Graphics layer. Click within the frame. The graphics frame is added to the Content Conveyor panel.



4. Click within the circular graphics frame below the Yield sign to add it to the Content Conveyor panel.

5. Open the Pages panel, and double-click page 3 to center it in the document window.

Tip

You can also press the B key to alternate between the Content Collector and Content Placer tools.

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6. Select the Content Placer tool ( ). (It's paired with the Content Collector tool in the Tools panel, and it's also available in the lower-left corner of the Content Conveyor panel.) The pointer changes to a loaded graphics icon with the Yield sign graphic active. Both graphics are loaded.

Note

Creating a link when placing content not only creates a link to the parent graphic, it also links the object's appearance. Link Options can be set from the Links panel menu.

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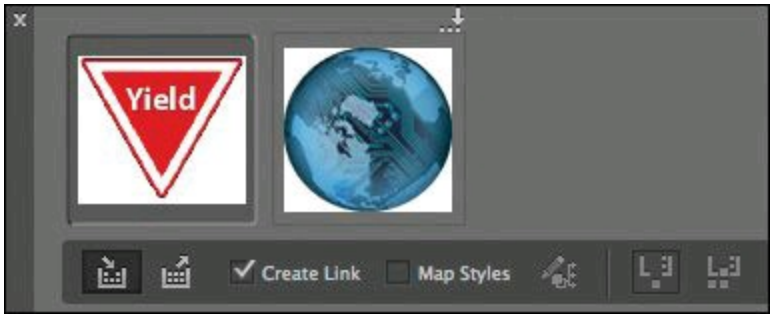
7. Select Create Link at the lower-left corner of the Content Conveyor panel. If you don't select Create Link, you will simply create copies of the original objects without any parent-child relationships.



Tip

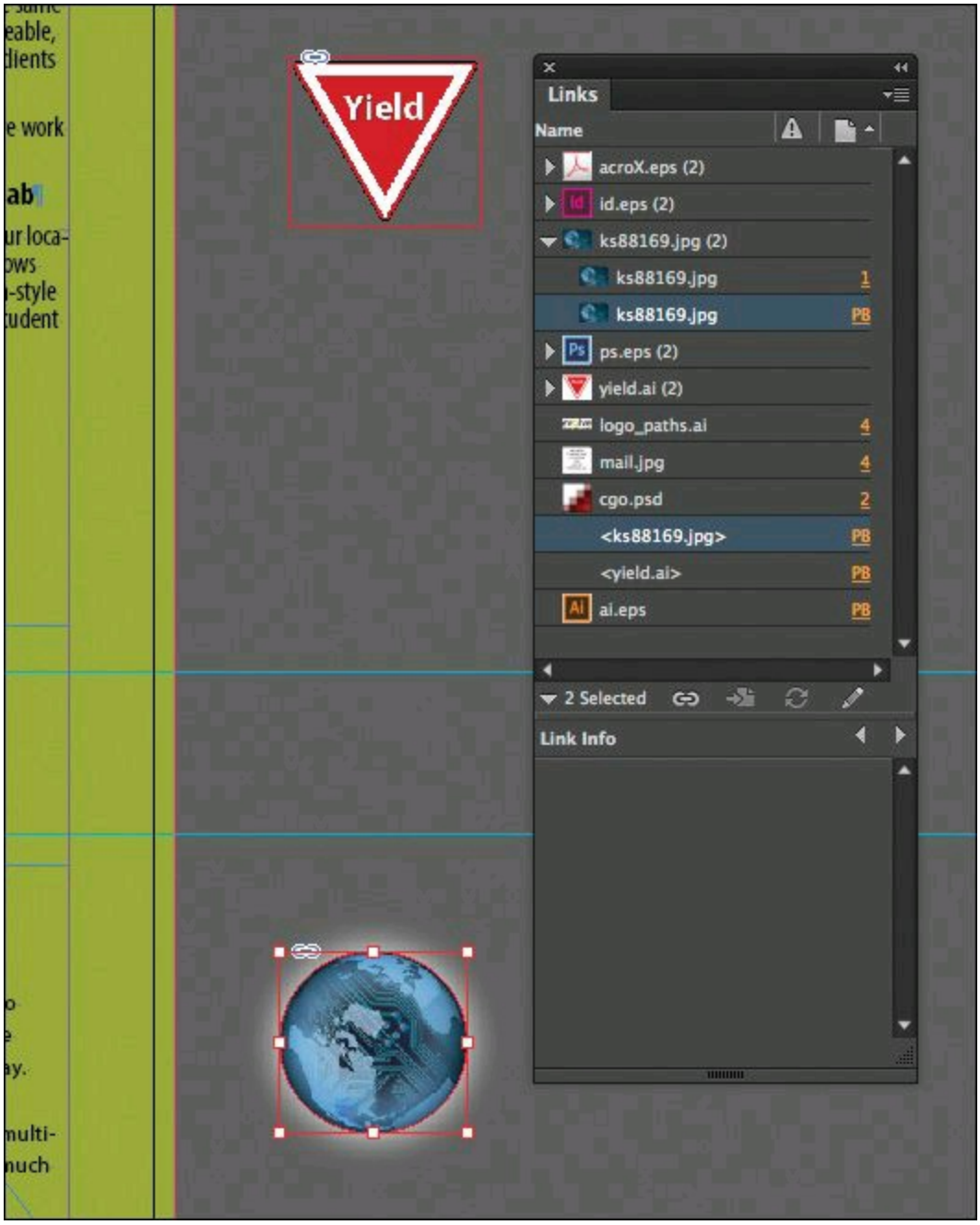
When you select the Content Placer tool, it is loaded with all objects in the Content Conveyor panel. Press the arrow keys to move between objects in the Content Conveyor panel. To remove an object from the Content Conveyor panel, press Esc.

8. Click the pasteboard to the right of the top article to place a copy of the Yield sign graphic, and then click the pasteboard to the right of the bottom article to place a copy of the circular graphic. The small chain in the upper-left corner of the graphics frames indicates that the frames are linked to parent objects.
9. Close the Content Conveyor panel.

Modifying and updating parent-child graphics frames

Now that you've placed and linked the two graphics frames, you'll see how the parent-child relationships work between the original objects and the copies.

1. Open the Links panel and adjust the panel so that all of the filenames of the imported graphics are visible in the scroll list. The selected circular graphic (<ks88169.jpg>) is highlighted in the list. The other graphic you placed and linked (<yield.ai>) is the next filename in the list. The greater than and less than characters (<>) that bracket the filenames indicate that these graphics are linked to parent objects. Notice that these two graphic files—the parent objects—are also listed higher up in the scroll list.



Tip

A Smart Guide appears when the top of the circular graphics frame is aligned with the top of the text frame.

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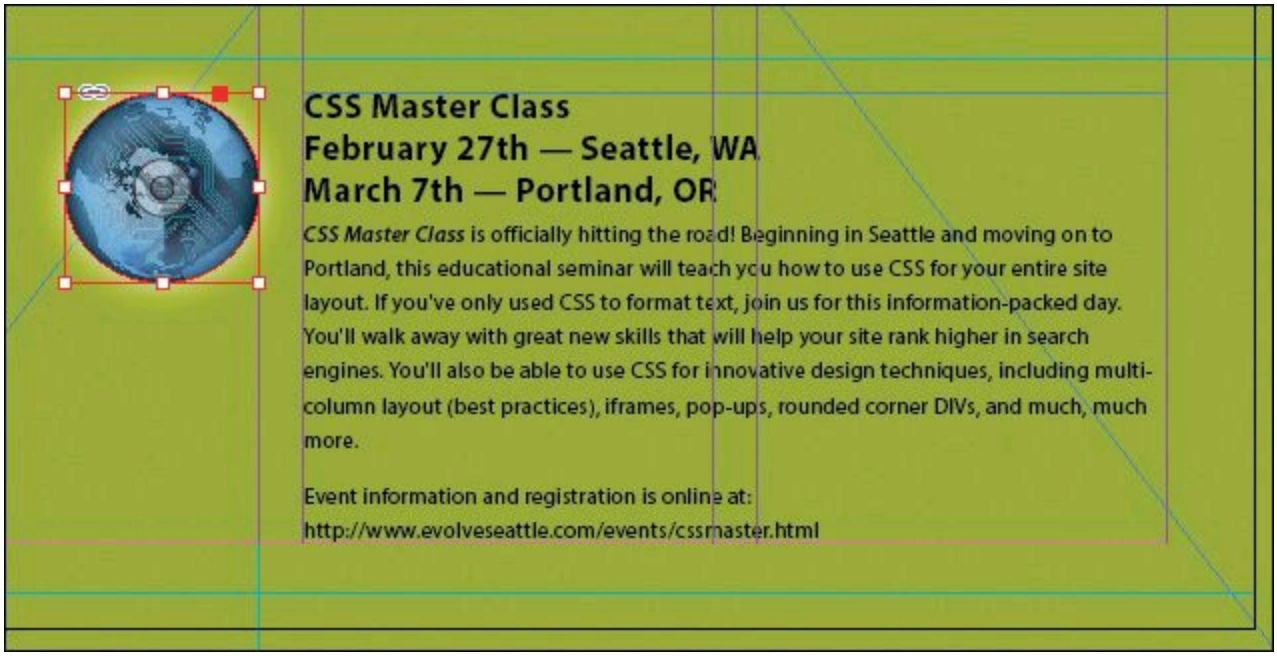
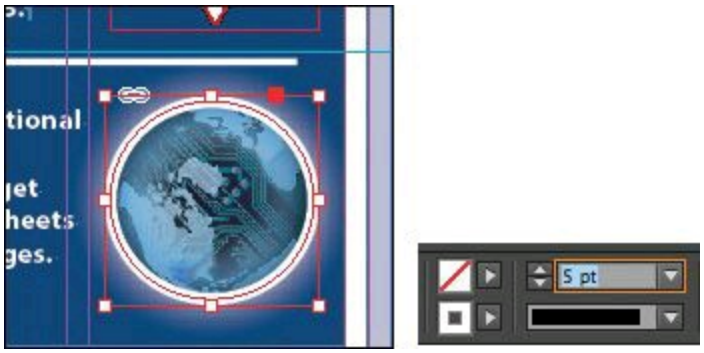
2. Use the Selection tool ( ) to position the circular graphics frame to the left of the "CSS Master Class" article. Align the top of the graphics frame with the top of the article's text frame; align the right edge of the graphics frame with the column guide to the left of the article's text frame.



3. Navigate to page 1 (the front cover page), and then select the circular graphics frame.

4. Use the Control panel to apply a 5-point white [Paper] stroke to the frame.



5. In the Links panel, notice that the status of the <ks88169.jpg> graphic on page 3 has changed to Modified ( ). That's because its parent object has been modified.

Tip

You can also click the modified link badge on the circular graphics frame on page 3 to update the link or double-click the modified link icon to the right of <ks88169.jpg> in the Links panel.

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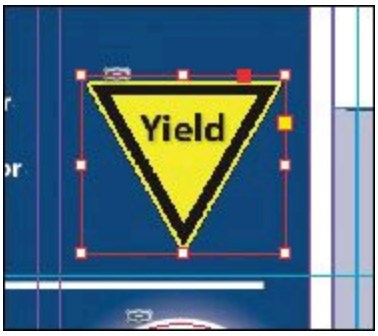
6. Navigate to page 3. Notice that the circular graphics frame no longer matches the version on the cover, and its link badge (the yellow triangle with the exclamation mark) also indicates it's been modified. Select the circular graphics frame, and then click the Update Link button ( ) in the Links panel. The frame now matches its parent.

Next, you'll replace the Yield sign graphic with a newer version, and then update its child frame.

1. Navigate to page 1, and then select the Yield sign graphic with the Selection tool.
2. Choose File > Place. Make sure Replace Selected Item is selected in the Place dialog box, and then double-click yield_new.ai in the Links folder in the Lesson04 folder.



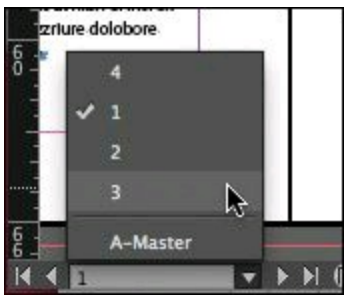
In the Links panel, notice that the status of the file named <yield_new.ai> that's on the pasteboard of page 3 is Modified. That's because you replaced the parent graphic on page 1.

3. Select <yield_new.ai> in the scroll list, and then click the Update Link button ( ) in the Links panel. If you want, navigate to page 3 to see the updated graphic on the pasteboard, and then return to page 1.
4. Click the pasteboard to deselect all objects, choose View > Fit Spread In Window, and then choose File > Save.

Changing the shape of a frame

When you resized a graphics frame using the Selection tool, the frame maintained its rectangular shape. Now you'll use the Direct Selection tool and the Pen tool to reshape a frame on page 3 (the right page of the center spread).

1. Choose 3 from the page box at the bottom of the document window. Choose View > Fit Page In Window.

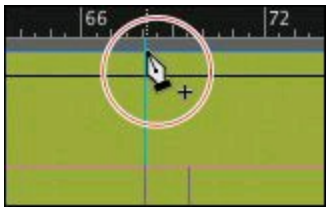


2. Click the Layers panel icon, or choose Window > Layers. In the Layers panel, click the lock

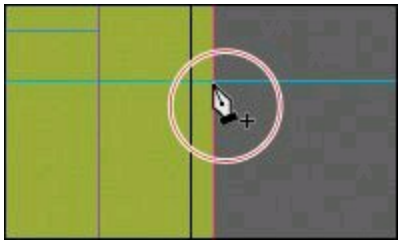
icon for the Text layer to unlock it, and click the Text layer to select it if it's not selected.

Next, you'll change the shape of a rectangular frame and, by doing so, change the background of the page.

3. Press the A key to switch to the Direct Selection tool ( ). Move the tip of the pointer over the right edge of the green frame that covers the page, and click when the pointer appears with a small diagonal line ( ). This selects the path and reveals the four anchor points and the center point of the frame. Leave the path selected.
4. Press the P key to switch to the Pen tool ( ).
5. Carefully position the pointer over the top edge of the frame path where it intersects with the vertical ruler guide in the first column on page 3. When a plus sign is displayed at the lower right of the pointer, click. A new anchor point is added. The Pen tool automatically changes to the Add Anchor Point tool when it moves over an existing path.

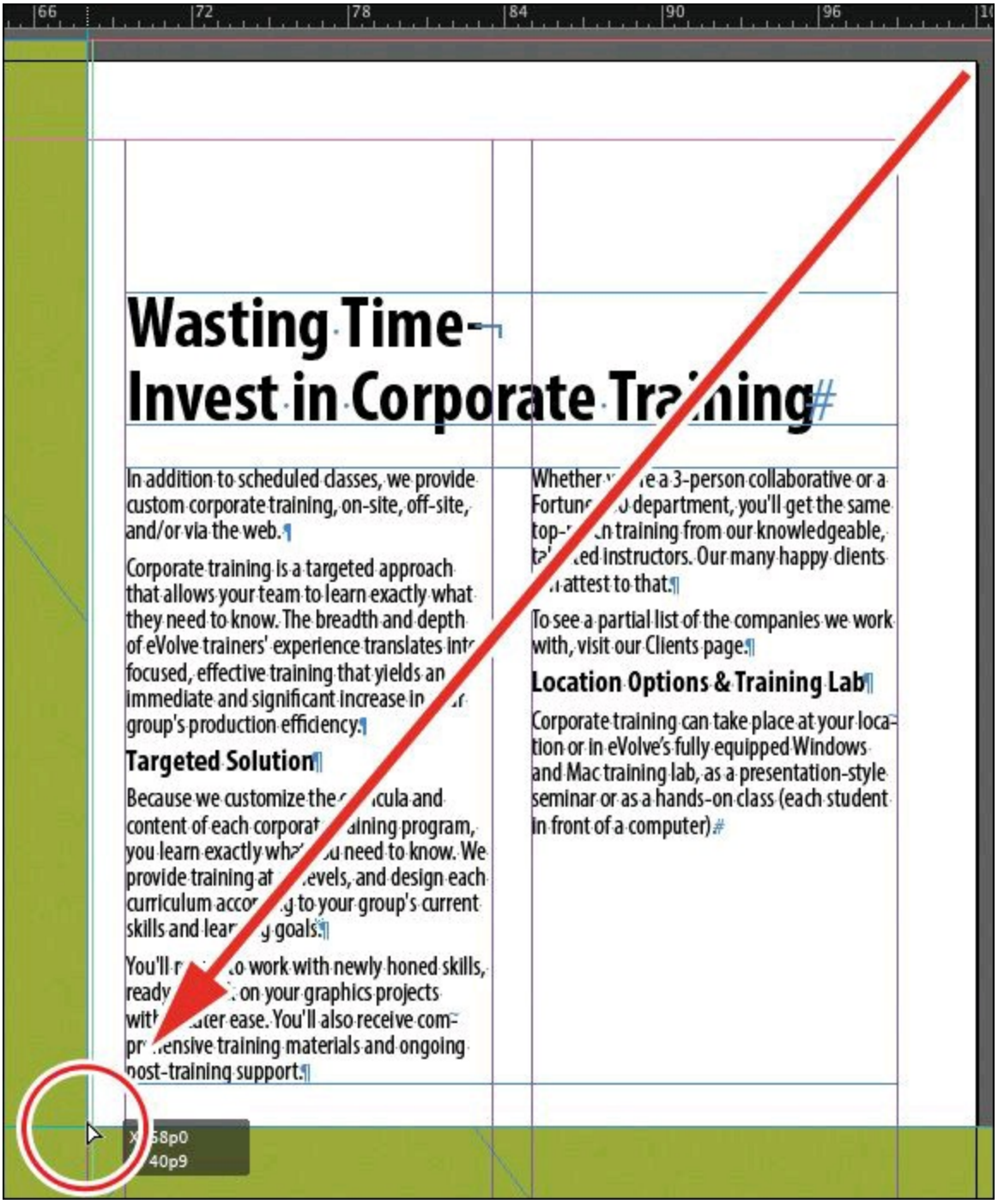


6. Move the pointer to where the horizontal guide below the two-column text frame intersects with the bleed guide. Using the Pen tool, click again to add another new anchor point, and then choose Edit > Deselect All.



This point and the point you created in the previous step will form the corners of the irregular shape you're creating. Repositioning the anchor point at the upper-right corner of the green frame will complete the reshaping of the frame.

7. Switch to the Direct Selection tool ( ). Click to select the upper-right corner point of the green frame. Drag the point down and to the left. (Pause before you drag so you can see the frame change as you drag.) When the anchor point snaps into place at the intersection of the right edge of the first column and the first horizontal guide from the top of the page (at 40p9 on the vertical ruler), release the mouse button.



The graphics frame is now properly shaped and sized for the design.

8. Choose File > Save.

Wrapping text around a graphic

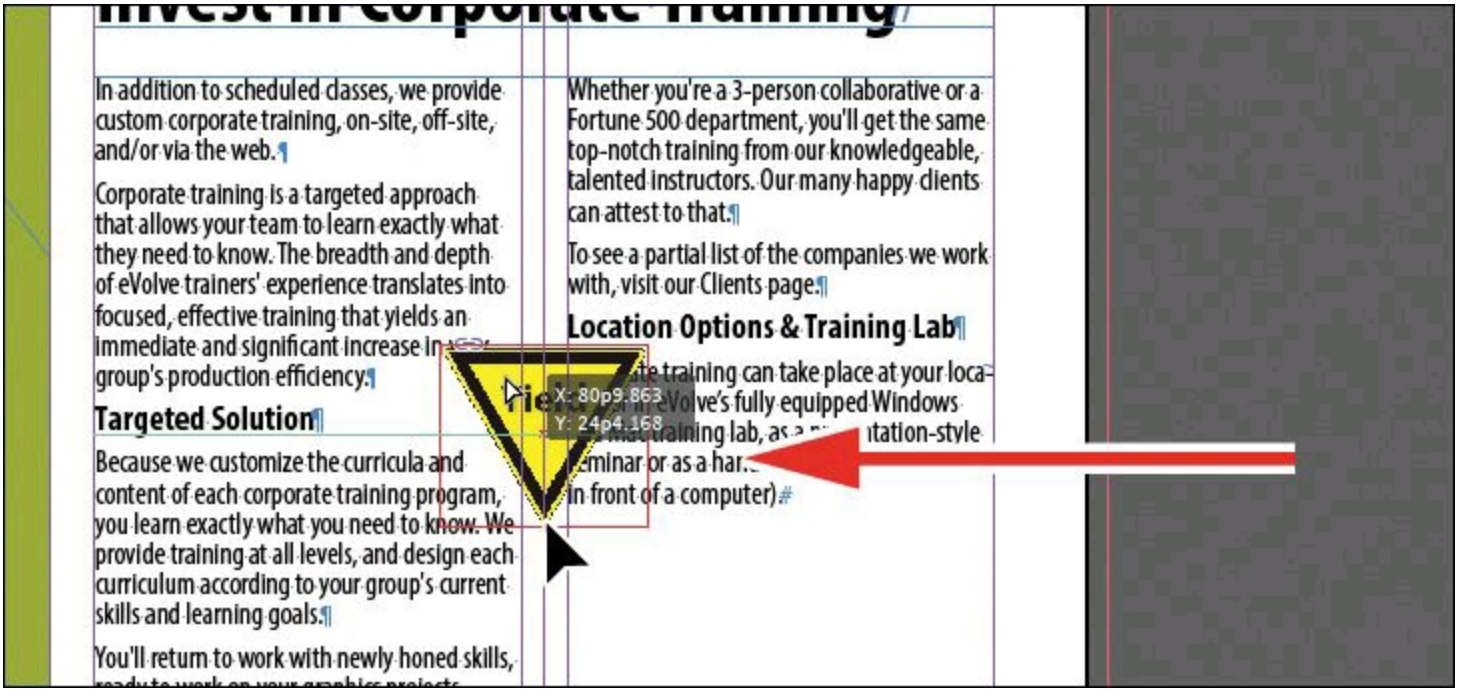
With InDesign you can wrap text around the rectangular bounding box of any object, around objects of any shape, and around imported images. As you wrap text around the Yield sign in this exercise, you'll see the difference between wrapping around its bounding box and around the shape of the graphic.

Your first task is to move the Yield sign graphic. For precise positioning, you can use the Smart Guides that are displayed dynamically when you create, move, or resize objects.

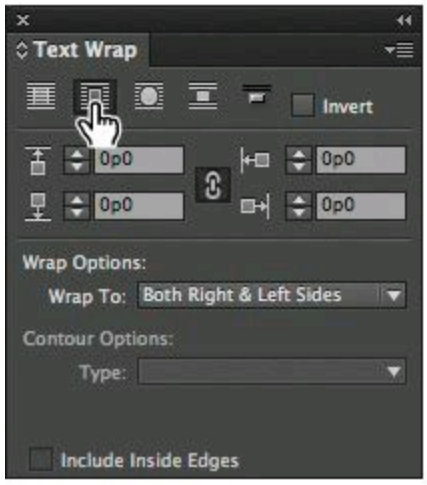
1. Using the Selection tool ( ), select the graphics frame with the image of a Yield sign on the pasteboard to the right of page 3. Make sure to click when the arrow pointer is displayed. If you click when the hand pointer is displayed, you'll select the graphic instead of the graphics frame.

2. Being careful not to select one of the handles, drag the frame to the left so that the center point of the frame is aligned with the center point of the text frame that contains the article text. When the two center points align, you should see a purple vertical Smart Guide and a green horizontal Smart Guide appear. When these guidelines appear, release the mouse button.

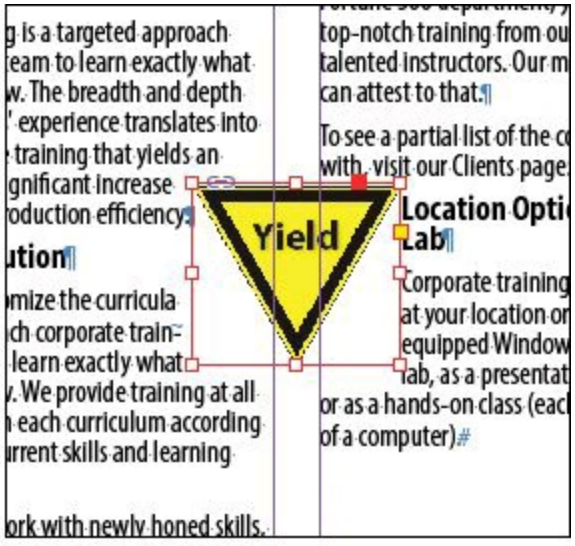
Make sure that you have moved the frame onto the page without changing its size. Notice that the graphic overlaps the text. You'll change this by applying a text wrap.



3. Choose Window > Text Wrap. In the Text Wrap panel, select Wrap Around Bounding Box to wrap the text around the bounding box, not around the Yield graphic's shape. If necessary, choose Show Options from the panel menu to display all of the controls in the Text Wrap panel.



Wrap text around a bounding box.



Result.

The option leaves too much white space for your desired design, so you'll try another Text Wrap option.

Note

The Wrap To menu in the Text Wrap panel is available only if you select Wrap Around Bounding Box or Wrap Around Object Shape at the top of the panel.

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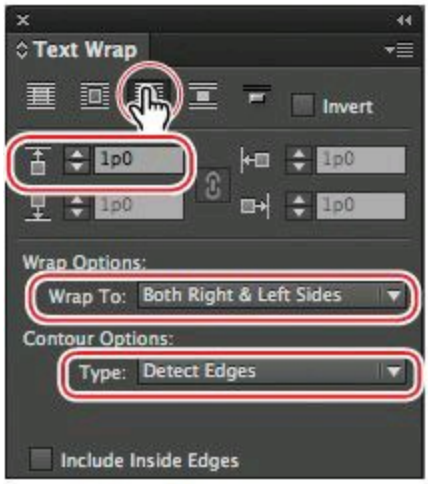
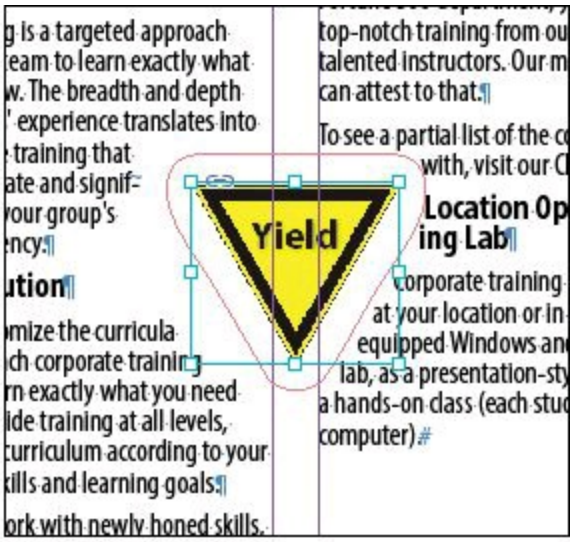
4. Select Wrap Around Object Shape. In the Wrap Options section, choose Both Right & Left Sides from the Wrap To menu if it isn't already selected. In the Contour Options section, choose Detect Edges from the Type menu. Enter **1p** in the Top Offset box to add space between the edge of the graphic and the text, and press Enter or Return. Click a blank area to deselect all, or choose Edit > Deselect All.



Wrap text around an object shape.



Result.

5. Close the Text Wrap panel, and choose File > Save.

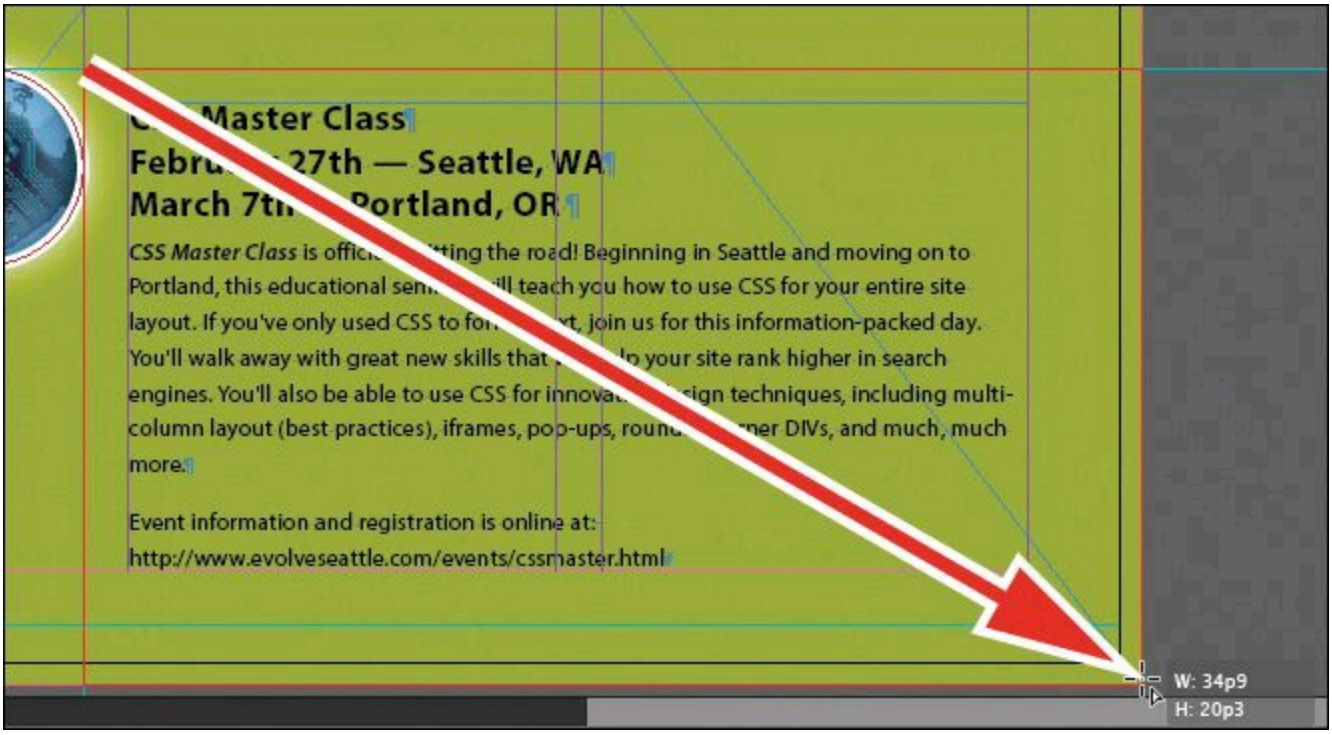
Modifying the shape of frames

In this section, you'll use various features that allow you to create nonrectangular frames. To begin, you'll subtract the area of one shape from another. After that, you'll create a polygon-shaped frame, and then you'll add rounded corners to a frame.

Working with compound shapes

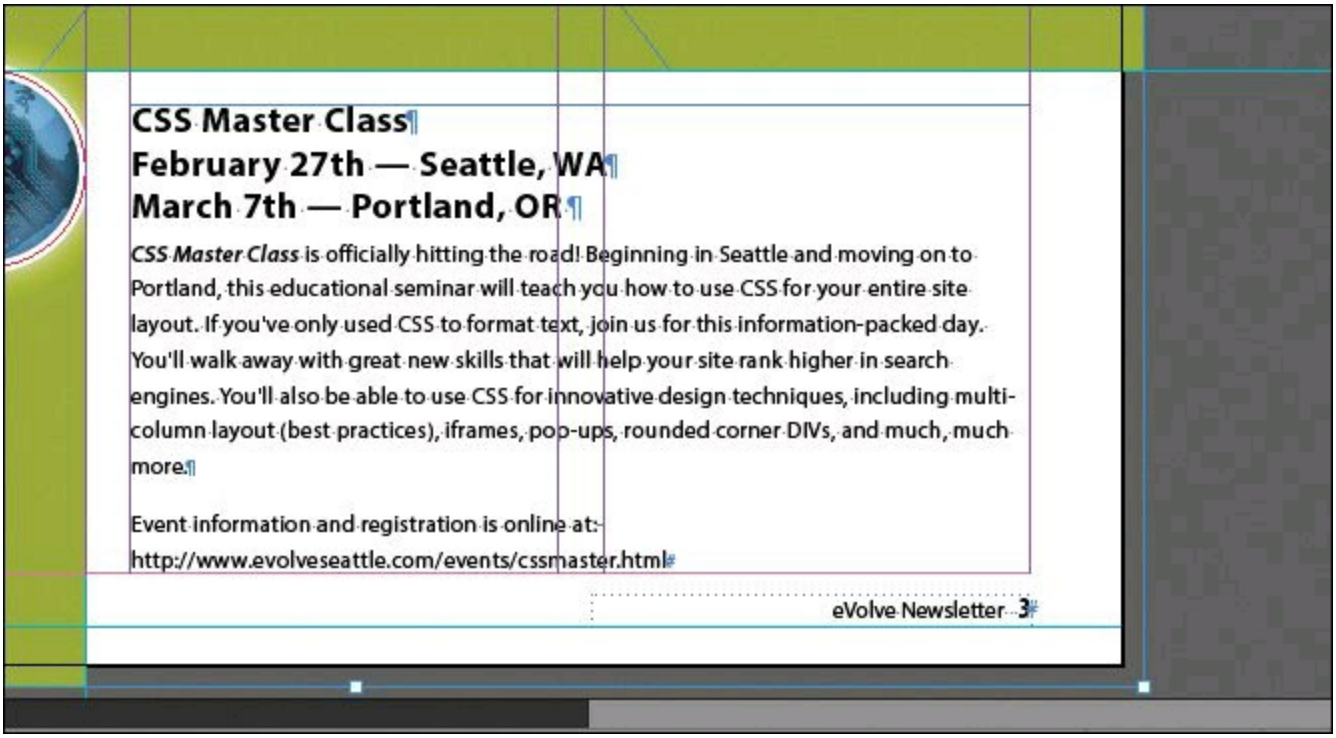
You can change the shape of an existing frame by adding other shapes to or subtracting other shapes from its area. The shape of a frame can also be changed, even if the frame already contains text or graphics. Now you'll subtract a shape from the green background on page 3 to create a white background for the article at the bottom of the page.

1. Choose View > Fit Page In Window to fit and center page 3 in the document window.
2. Using the Rectangle Frame tool ( ), draw a frame from where the right edge of the first column meets the horizontal guide at 46p6 on the vertical ruler, to the intersection of the bleed guides that meet outside the lower-right corner of the page.



Draw a rectangle, and snap to the bleed guide corner.

3. With the Selection tool ( ), hold down the Shift key and click the green box (outside of the frame you just created) that covers a good part of page 3 to simultaneously select the new rectangle and the green box. Two frames are now selected.
4. Choose Object > Pathfinder > Subtract to subtract the top shape (the new rectangle) from the green shape. The text frame at the bottom of the page is now on a white background.



Tip

A lock icon ( ) is displayed in the upper-left corner of a locked frame. Clicking the icon unlocks the frame.

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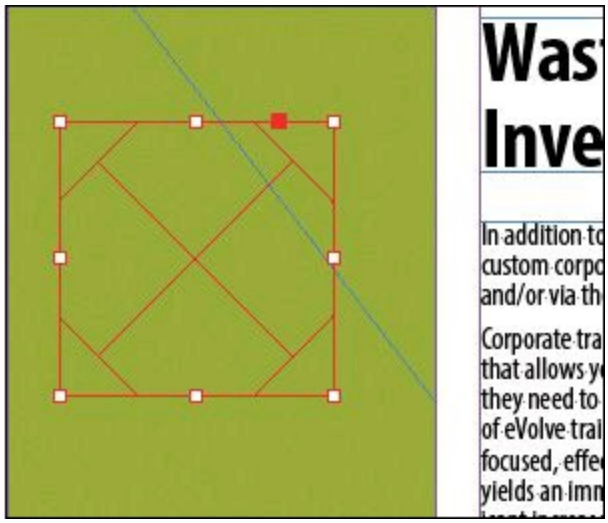
5. With the green box still selected, choose Object > Lock. This helps avoid accidental repositioning of the frame.

Creating polygons and converting shapes

You can use the Polygon tool ( ) or the Polygon Frame tool ( ) to create regular polygons with however many sides you want. You can also change the shape of an existing frame, even if the frame already contains text or graphics. You'll try this out by creating an octagonal frame, placing a graphic within it, and then resizing the frame.

1. Click the Layers panel icon or choose Window > Layers to open the Layers panel.
2. Click the Graphics layer to select it.
3. Select the Polygon Frame tool ( ) in the Tools panel. It's grouped with the Rectangle Frame tool ( ) and the Ellipse Frame tool ( ).
4. Click anywhere on page 3 to the left of the text "Wasting Time." In the Polygon dialog box, change Polygon Width and Polygon Height to **9p**, change Number Of Sides to **8**, and then click OK.



5. With the polygon shape selected, choose File > Place, and select stopsign.tif in the Links folder in the Lesson04 folder. Click Open.

6. Use the Zoom tool ( ) to zoom in on the graphic, and then choose Object > Display Performance > High Quality Display to display the graphic as clearly as possible.
7. Using the Selection tool ( ), drag the midpoint handle on the top of the graphics frame

downward until the edge of the frame is even with the top of the Stop sign. Drag the three other midpoint handles so that all of the surrounding area is cropped and only the red of the Stop sign is visible.

8. Choose View > Fit Page In Window, and then use the Selection tool ( ) to move the frame so that its vertical center edge aligns with the top edge of the text frame to the right that contains the headline (a green Smart Guide is displayed), and its right edge is approximately one gutter width to the left of the right edge of the green background frame. Pause briefly before dragging to display the graphic as you drag.

Adding rounded corners to frames

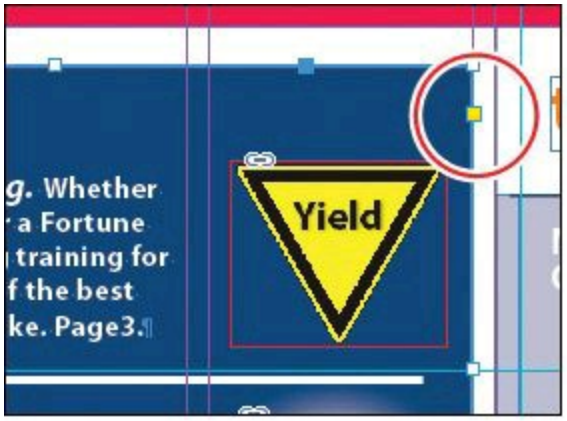
Next, you'll modify a text frame by rounding its corners.

1. Choose 1 from the page box at the bottom of the document window. Choose View > Fit Page In Window.
2. With the Selection tool ( ) still selected, hold down the Z key to temporarily access the Zoom tool ( ), zoom in on the dark blue text frame on page 1, and then release the Z key to return to the Selection tool.

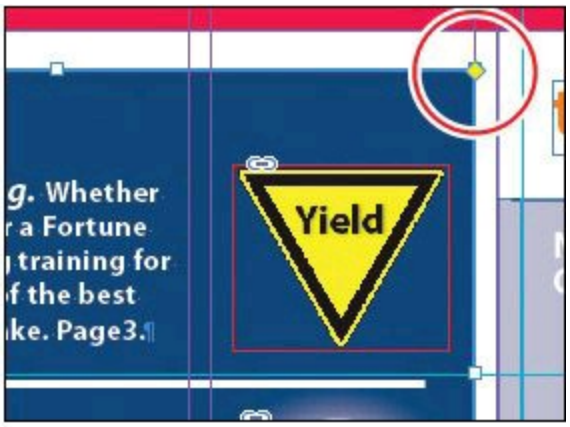
Tip

If the yellow square is not visible when selecting the frame, choose View > Extras > Show Live Corners. Also ensure Screen Mode is set to Normal (View > Screen Mode > Normal).

3. Select the dark blue text frame, then click the small yellow square that's slightly below the resizing handle at the upper-right corner of the frame. Four small yellow diamonds replace the four resizing handles at the corners of the frame.



Click the yellow square.

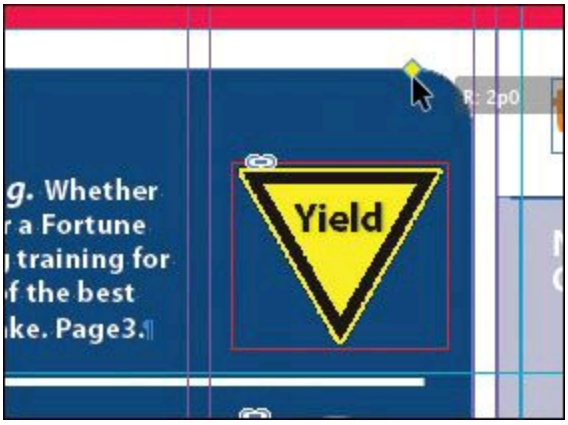


Result.

Tip

After you create rounded corners, you can Alt-click (Windows) or Option-click (Mac OS) any of the diamonds to cycle through several different corner effects.

4. Drag the diamond at the upper-right corner of the frame to the left and release the mouse button when the live radius (R:) value is approximately 2p0. As you drag, the other three corners change, too. (If you hold down the Shift key when dragging, only the corner you are working on changes.)



5. Choose Edit > Deselect All to exit live corner edit mode, then choose File > Save.

Transforming and aligning objects

Various tools and commands in InDesign let you modify an object's size or shape and change its orientation on the page. All transformations—rotating, scaling, shearing, and flipping—are available in the Transform and Control panels, where you can precisely specify transformations. You can also align or distribute objects horizontally or vertically along the selection, margins, page, or spread.

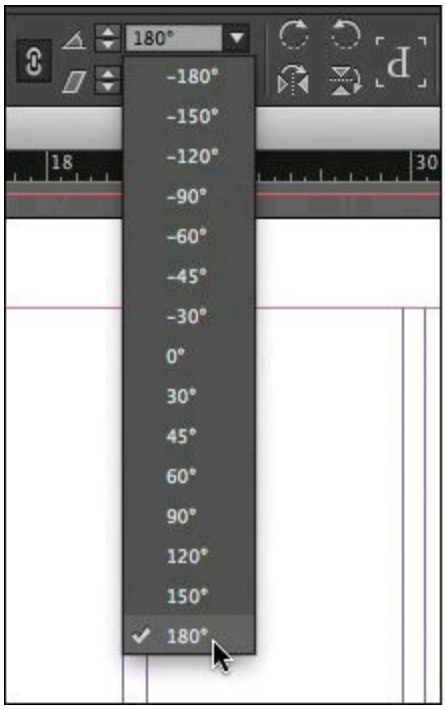
You'll experiment with some of these features now.

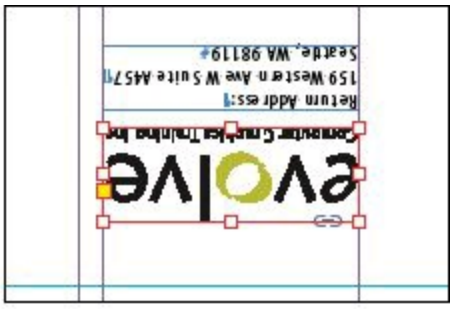
Rotating an object

InDesign offers several methods for rotating objects. In this part of the lesson, you'll use the Control

panel to rotate one of the logos you imported earlier in the lesson.

1. Use either the page box at the bottom of the document window or the Pages panel to display page 4 (the first page of the document; the back page of the newsletter). Choose View > Fit Page In Window.
2. Using the Selection tool ( ), select the "evolve" logo you imported earlier in the lesson. (Make sure you select the graphics frame and not the graphic within.)
3. At the left end of the Control panel, make sure that the center point is selected on the Reference Point locator ( ) so that the object rotates around its center. Choose 180° from the Rotation Angle menu in the Control panel.





Rotating an image within its frame

You can rotate the content of a graphics frame with the Selection tool.

Tip

You can also rotate a selected object by choosing Object > Transform > Rotate and entering a value in the Angle field of the Rotate dialog box.

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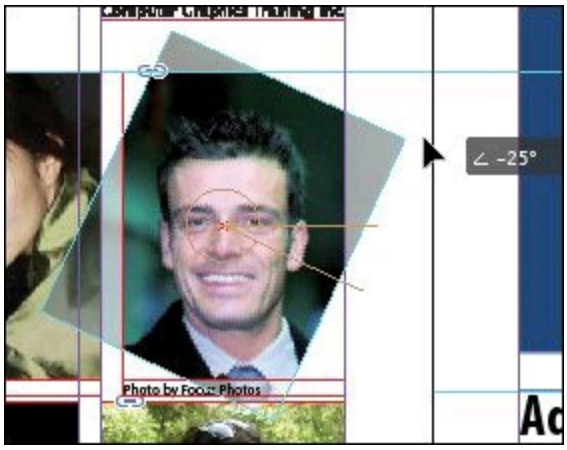
1. Using the Selection tool ( ), select the image of Jeff G. (top right) by clicking within the content grabber. The arrow pointer changes to a hand when it's within the doughnut shape.

Move the pointer within the doughnut.

Click to select the content of the frame.

2. In the Control panel, make sure that the center point in the reference point locator ( ) is selected.
3. Move the pointer slightly outside the resizing handle at the upper-right corner of the picture. The rotate pointer ( ) is displayed.
4. Click and drag clockwise to rotate the image until the head is approximately vertical (about -25°), and then release the mouse button. As you drag, the angle of rotation is displayed along with the image.



Tip

To fill the frame with the image after rotating it, you can also choose Object > Fitting > Fill Frame Proportionately.

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5. After being rotated, the image no longer fills the frame. To fix this, first make sure that the Constrain Proportions For Scaling icon ( ) to the right of the Scale X Percentage and Scale Y Percentage boxes in the Control panel is selected, and then enter **55** in the Scale X Percentage box and press Enter or Return.

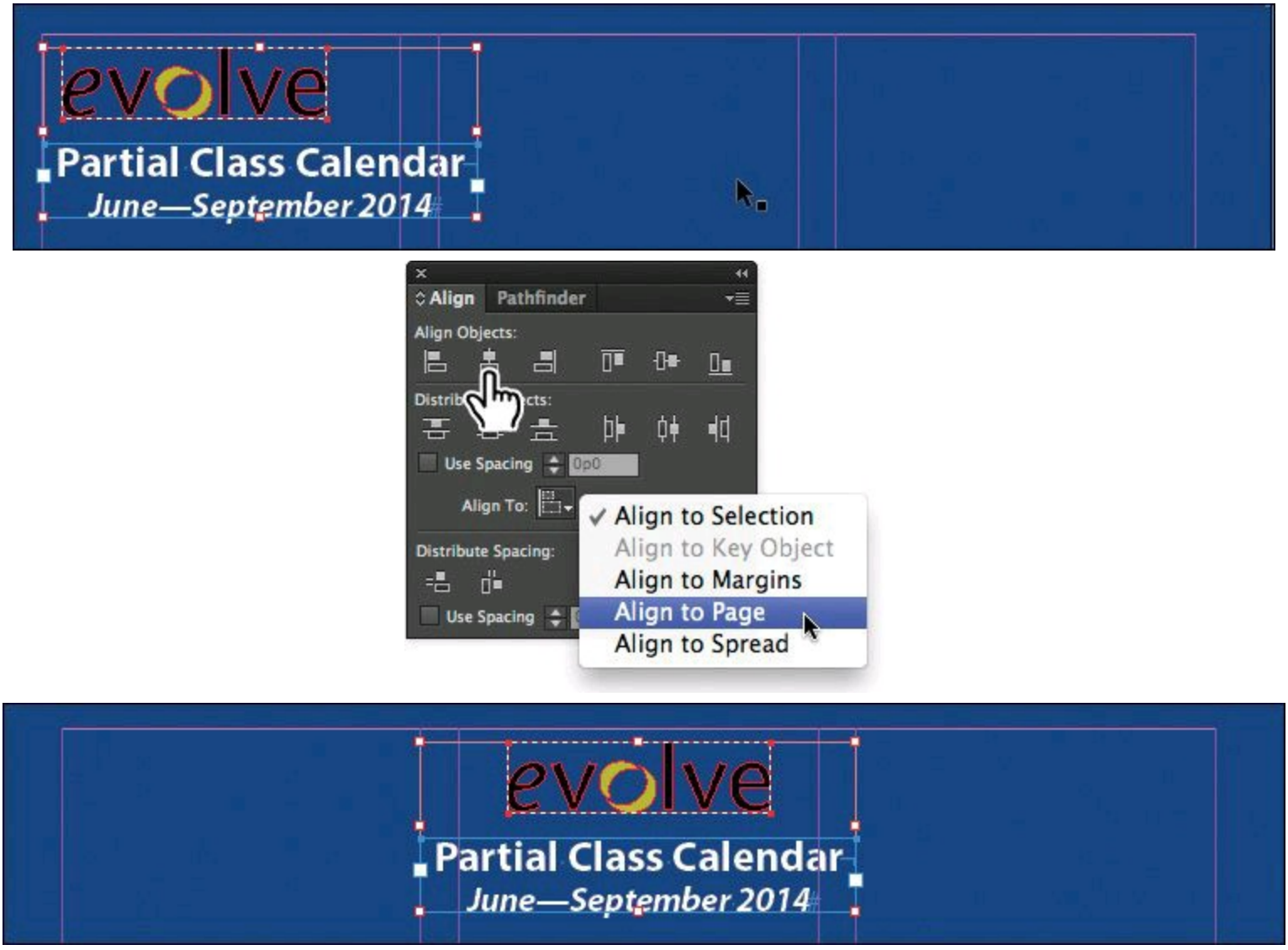
6. Choose Edit > Deselect All, and then choose File > Save.

Aligning multiple objects

Precise alignment is made easy when you use the Align panel. Next, you'll use the Align panel to

horizontally center multiple objects on a page, and then you'll align multiple images.

1. Choose View > Fit Page In Window, and then choose page 2 in the page box at the bottom of the document window.
2. Using the Selection tool ( ), Shift-click the text frame at the top of the page containing the "Partial Class Calendar" text and the "evolve" logo above it. (Unlike the two logos you imported earlier, this logo was created within InDesign and is a group of objects. You'll work with this group later in the lesson.)
3. Choose Window > Object & Layout > Align to open the Align panel.
4. In the Align panel, choose Align To Page from the Align To menu, and then click the Align Horizontal Centers button ( ). The objects are now aligned to the center of the page.



Top: Select the text frame and logo. Center: Align the objects. Bottom: Result.

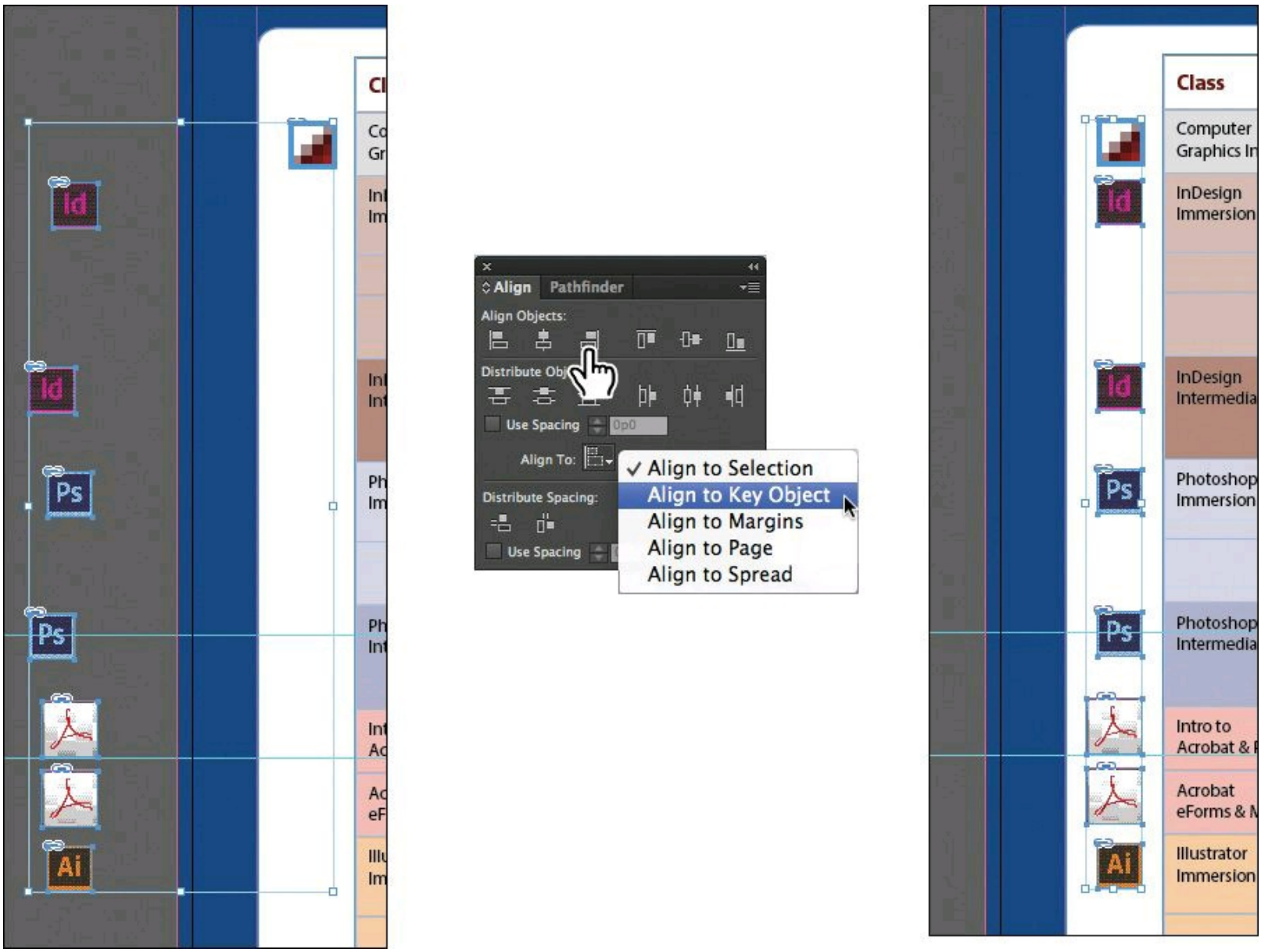
5. Click a blank area or choose Edit > Deselect All.
6. Use the scroll bar at the bottom of the document window to show more of the pasteboard on the left of page 2. You'll see seven program icons.

Note

When you specify a key object, the alignment of the other selected objects will be

relative to the key object's position.

7. Using the Selection tool ( ), select the graphics frame at the upper-left corner of the calendar, and then Shift-click to select the seven graphics frames.
8. In the Align panel, choose Align To Key Object from the Align To menu. Notice that the first graphics frame you selected now has a thick blue border, indicating it's the key object.
9. Click the Align Right Edges button ( ).



Tip

InDesign automatically assigns the object you selected first as the key object. To change the key object once you've selected all objects to be aligned, click the object that should be the key object. A thicker selection border will then appear around that object.

10. Choose Edit > Deselect All, and then choose File > Save.

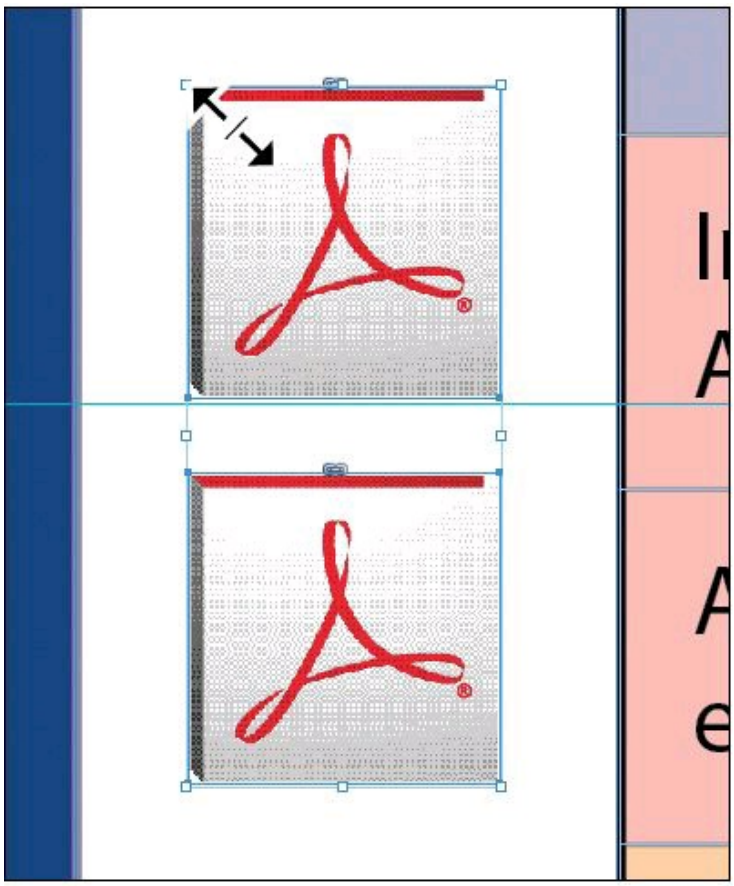
Scaling multiple objects

In earlier versions of InDesign you could transform multiple objects only by using the transform tools

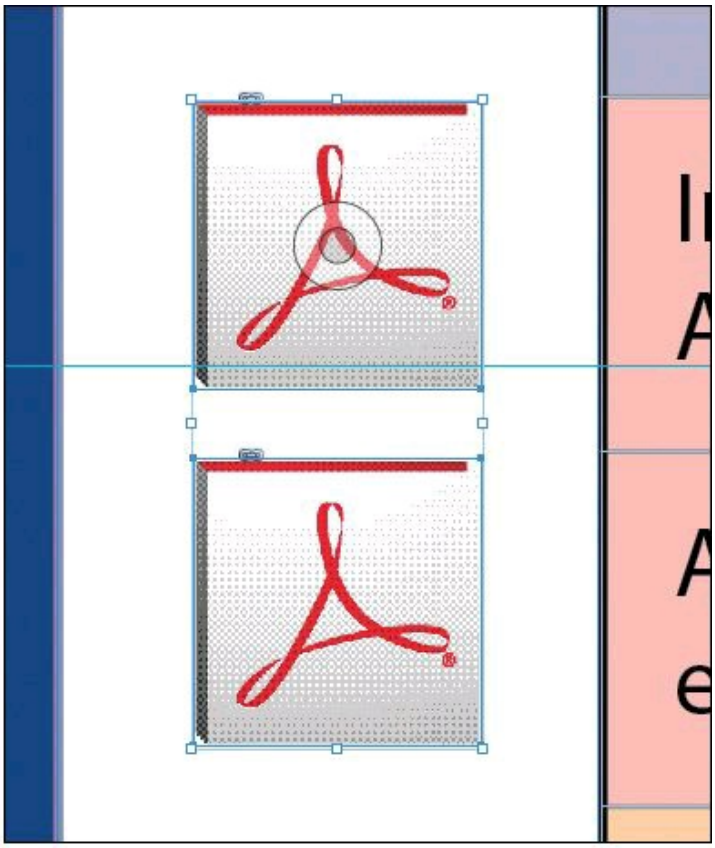
or by first grouping the objects. You can now scale multiple selected objects without the need to select a transform tool first or group objects.

Next you'll select two of the icons and resize both of them at once.

1. Use the Zoom tool ( ) to zoom in on the two Acrobat PDF icons on the left side of the page.
2. Using the Selection tool ( ), Shift-click each of the two icons to select both of them.
3. Press Shift+Ctrl (Windows) or Shift+Command (Mac OS), and then drag the handle at the upper-left corner down and to the right to make the two icons the same width as the Adobe Photoshop icon above the selected icons. A Smart Guide is displayed when the left edges of the selected frames align with the frame above.



Drag to resize the selected icons.



Result.

4. Choose Edit > Deselect All, and then choose File > Save.

Selecting and modifying grouped objects

Earlier you aligned the "evolve" logo at the top of page 2 to the center of the page. Now you'll change the fill color of some of the logo's shapes. Because they're grouped, you can select and modify them as a unit. You'll now change the fill color of just a few of the shapes without ungrouping or changing the other objects of the group.

The Direct Selection tool, or a set of commands in the Object menu (Object > Select), lets you select individual objects in a grouped object.

1. Choose View > Fit Spread In Window.
2. With the Selection tool ( ), click the "evolve" group at the top of page 2. If you want, use the Zoom tool ( ) to magnify the area you're working on.

Tip

You can also select an object in a group by double-clicking the object with the Selection tool; by selecting the group and choosing Object > Select > Content; or by right-clicking (Windows) or Control-clicking (Mac OS) the group and choosing Select > Content from the context menu.

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3. Click the Select Content button ( ) in the Control panel to select one object in the group without ungrouping.

Select the group with the Selection tool.

Choose Select Content.

Result.

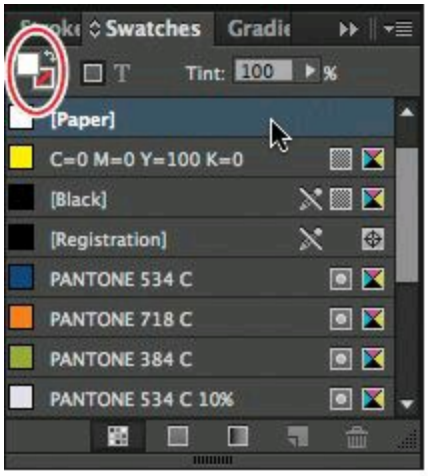
4. Click the Select Previous Object button ( ) in the Control panel six times to select the first "e" in the word "evolve." Note that the Select Next Object button selects in the opposite direction.

Click Select Previous Object six times.

Result.

5. Using the Direct Selection tool ( ), hold down the Shift key and click the "v," "l," "v," and "e" letters in the logo to simultaneously select them.

6. Click the Swatches panel icon or choose Window > Color > Swatches. Click the Fill box at the top of the Swatches panel and choose [Paper] to fill the letter shapes with a white color.



Change the fill of the selected shapes to [Paper].

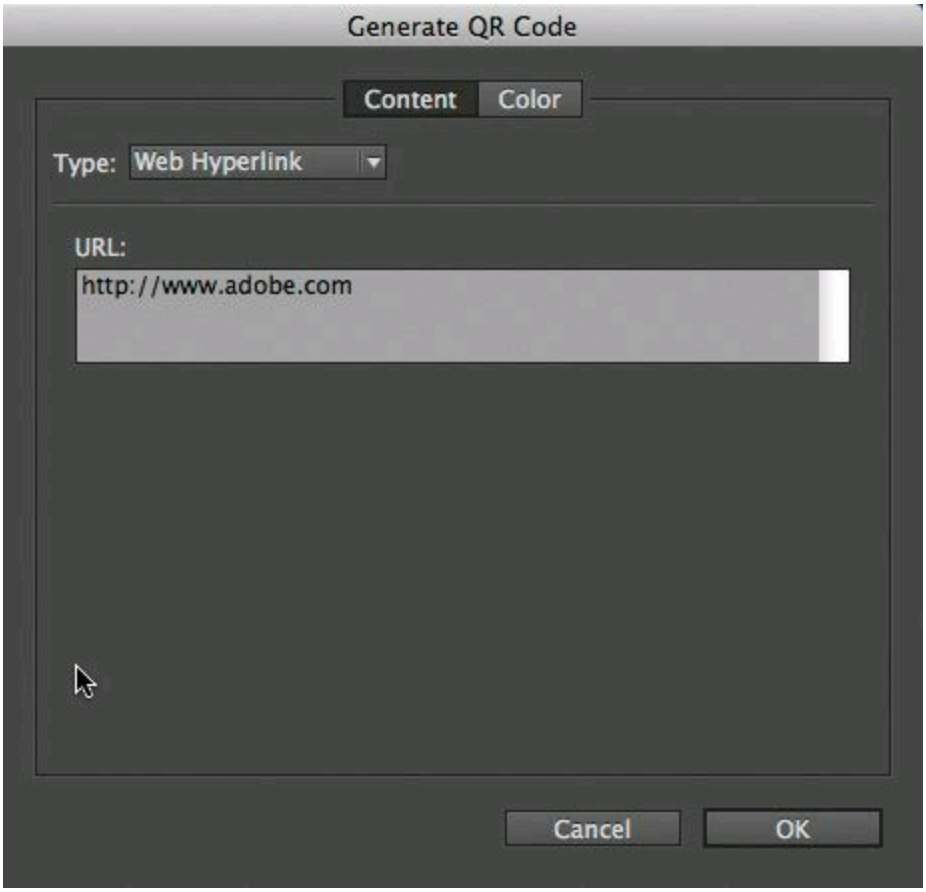
Result.

Creating a QR code

A new feature introduced in InDesign CC lets you quickly add QR (short for Quick Response) codes to a layout. A QR code is a type of barcode that consists of black or colored squares arranged in a grid on a white background. The code contains information, such as a hyperlink, plain text, or a text message, that can be electronically scanned by devices such as smartphones.

Next, you'll add a QR code to the back page of the newsletter and configure it to open a web page.

1. Navigate to page 4 of the document (the back cover) and choose View > Fit Page In Window to center the page.
2. Choose Object > Generate QR Code.
3. Choose each of the options in the Type menu to view the associated controls, and then choose Web Hyperlink.
4. In the URL field, enter **http://www.adobe.com** (or the complete URL for any website you want).

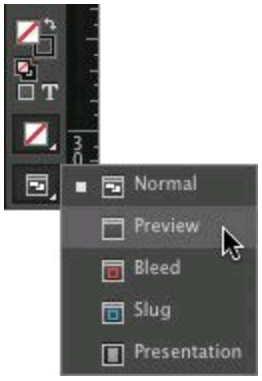


5. Click OK to close the dialog box.
6. Click the intersection of the margin guides at the lower-left corner of the page, and then drag upward until the edge of the frame aligns with the first column guide.

Finishing up

Now it's time to admire your work.

1. Choose Edit > Deselect All.
2. Choose View > Fit Spread In Window.
3. At the bottom of the Tools panel, hold down the current screen mode button ( ) and choose Preview from the hidden menu that appears. Preview mode is an ideal way to see what a document will look like when printed. Preview mode displays artwork as if it were output, with all nonprinting elements suppressed (grids, guides, nonprinting objects) and the pasteboard set to the preview color defined in Preferences.



4. Press the Tab key to close all the panels at the same time. Press the Tab key again when you are ready to show all the panels.
5. Choose File > Save.

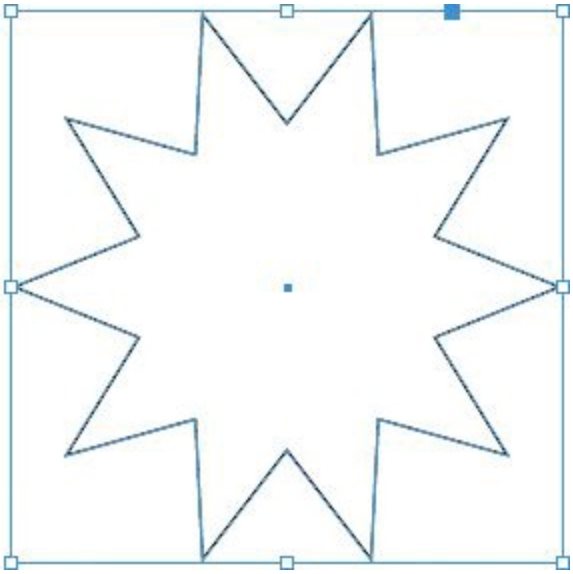
Congratulations. You have finished the lesson.

Exploring on your own

One of the best ways to learn about frames is to experiment on your own.

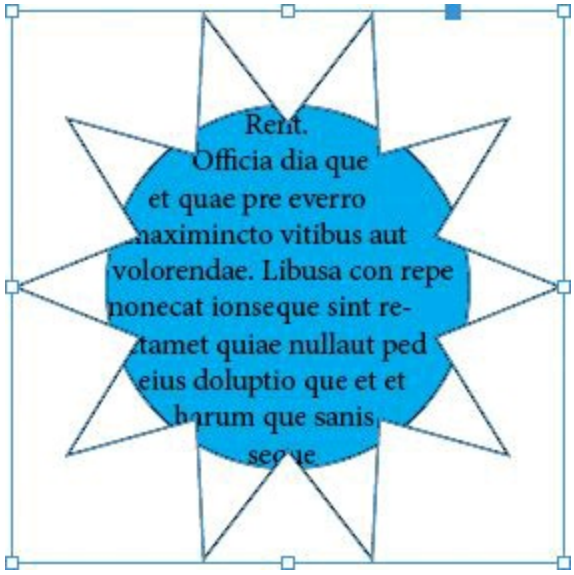
In this section, you'll learn how to nest an object inside a frame. Follow these steps to learn more about selecting and manipulating frames.

1. Create a new (Print) document using the default settings in the New Document dialog box.
2. Use the Ellipse Frame tool ( ) to create a small circular text frame, approximately 12p0 × 12p0″. (Press the Shift key as you drag to constrain the shape to a circle.)
3. Select the Type tool and then click within the frame to convert it to a text frame.
4. Choose Type > Fill With Placeholder Text to fill the frame with text.
5. Press the Esc key to switch to the Selection tool, and then use the Swatches panel to apply a fill color to the text frame.
6. Select Edit > Deselect All, then select the Polygon tool ( ) and draw a shape on the page. (Before creating the polygon, you can double-click the Polygon tool to specify the number of sides and optionally a star inset value if you want to create a starburst shape.)



7. Select the Selection tool ( ), select the text frame you created earlier, and then choose Edit > Copy.

8. Select the polygon frame, and then choose Edit > Paste Into to nest the text frame inside the polygon frame. (If you choose Edit > Paste, the copied text frame is not pasted inside the selected frame.)



9. Use the Selection tool to move the text frame by positioning the pointer within the content grabber in the center of the polygon frame and then dragging.
10. Use the Selection tool to move the polygon frame and its content by positioning the pointer outside the content grabber and then dragging.
11. Choose Edit > Deselect All.
12. Select the Direct Selection tool ( ), use it to select the polygon frame, and then drag any of the handles to change the shape of the polygon.
13. When you have finished experimenting, close the document without saving.

Review questions

1. When should you use the Selection tool to select an object, and when should you use the Direct Selection tool to select an object?
2. How do you resize a graphics frame and its content simultaneously?
3. How do you rotate the graphic within a graphics frame without rotating the frame?

4. Without ungrouping objects, how do you select an object within a group?

Review answers

1. Use the Selection tool for general layout tasks, such as positioning, rotating, and resizing objects. Use the Direct Selection tool for tasks involving editing paths or frames; for example, to move an anchor point on a path or to select objects within a group and change their color.
2. To resize a graphics frame and its content simultaneously, select the frame with the Selection tool, hold down Ctrl (Windows) or Command (Mac OS), and then drag a handle. Add the Shift key while dragging to maintain the object's and content's proportions. Alternatively, you can enable the Auto-Fit feature for a selected graphics frame and resize it without the need to hold down the Ctrl (Windows) or Command (Mac OS) key.
3. To rotate a graphic within a frame, use the Selection tool to select the graphic within the frame by clicking within the content grabber. Then position the pointer slightly outside any of the four corner handles and drag to rotate the graphic.
4. To select an object within a group, use the Selection tool ( ) to select the group, and then click the Select Content button ( ) in the Control panel to select one object in the group. You can then click the Select Previous Object or Select Next Object button to select different objects in the group. You can also select an object in a group by clicking the object with the Direct Selection tool ( ) or double-clicking it with the Selection tool.

5. Flowing Text

Lesson Overview

In this lesson, you'll learn how to do the following:

- Import and flow text into an existing text frame.
- Apply paragraph styles to text.
- Adjust line breaks.
- Create frames manually while flowing text.
- Add frames automatically while flowing text.
- Resize text frames automatically.
- Create linked frames automatically.
- Add pages and linked frames automatically while flowing text.
- Make a jump line to indicate where an article continues.
- Add column breaks.

This lesson will take about 45 minutes to complete.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the "Getting Started" section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.

Adobe InDesign provides methods for flowing short pieces of text into existing frames, creating frames while flowing text, and adding frames and pages while flowing text. This makes it easy to flow copy for anything from a catalog to a magazine article to an ebook.

Getting started

In this lesson, you'll work on a magazine article in progress. The design of the opening spread of the article is almost finished, and several pages are ready for text. While working on this article, you will experiment with various text-flow methods and create a "jump line" to indicate the page on which an article continues.

1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

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2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], then choose Window > Workspace > Reset Advanced.
3. Choose File > Open, and open the 05_Start.indd file, in the Lesson05 folder, located inside the

Lessons folder within the InDesignCIB folder on your hard disk. If the Missing Fonts dialog box displays, click Sync Fonts.

4. Choose File > Save As, rename the file **05_FlowText.indd**, and save it in the Lesson05 folder.
5. Choose View > Display Performance > High Quality Display.

Note

Flowing text is one of the first things you will do when designing a document. In this lesson, you will finish working on this document when all the text fits. For the final publication, you would add many more pictures, captions, and design elements.

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6. If you want to see what the finished document looks like, open the 05_End.indd file in the same folder. Choose View > Display Performance > High Quality Display. You can leave this document open to act as a guide as you work.

7. When you're ready to resume working on the lesson document, display it by clicking its tab in the upper-left corner of the document window.

Flowing text into an existing frame

When you import text, you can flow it into a new frame or an existing frame. If the frame is empty, you can click the loaded text icon in it to flow the text. On the leftfacing page of the opening spread of this article, an empty sidebar box with the subhead "local stats" is ready for the text describing the woman on the page. You will import a Microsoft Word document into this frame, apply a paragraph style, and try two methods for fixing orphans, which are defined here as a single word on a line.

Orphans are also known as “runts.”

Tip

InDesign provides many features for automatically and manually controlling how text flows through columns and frames. These include the following paragraph formats Keep With Previous, Keep With Next, and Keep Lines Together, along with Column Break and Frame Break characters (Type > Insert Break Character).

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1. Zoom in to comfortably view the sidebar text frame on the left-facing page of the opening spread. Make sure no objects are selected.

You edit text with the Type tool and thread (link) text frames with the Selection tool, but it does not matter what tool is selected when you import text.

2. Choose File > Place. At the bottom of the Place dialog box, make sure the three options are deselected: Show Import Options, Replace Selected Item, and Create Static Captions.
3. Locate 05_LocalStats.docx, in the Lesson05 folder, and then double-click it.

The pointer becomes a loaded text icon (), previewing the first few lines of text in the story you are placing. When you move the loaded text icon over an empty text frame, parentheses enclose the icon ( ).

4. Position the loaded text icon over the placeholder text frame (below the text frame containing the “local stats” subhead).

5. Click to place the text.
6. Using the Type tool (), click in the frame to edit the text. Choose Edit > Select All to select all the text in the frame.
7. Choose Type > Paragraph Styles to open the Paragraph Styles panel.
8. Click on the paragraph style White Sidebar Text. (If necessary, scroll through the Paragraph Styles panel to locate it.)

   A plus sign (+), which indicates local overrides (variations from the paragraph style), displays next to the paragraph style name because some of the selected text is bold. While sometimes local overrides are undesirable, in this case they are fine.

Tip

One method for clearing all local overrides—to ensure that text formatting precisely matches a style—is to select Clear Overrides from the Paragraph Styles panel menu. For more information about styles, see Lesson 9, "Working with Styles."

Now, you will fix the orphan in the third paragraph, which starts with "Occupation." To do this, you will enter a forced line break.

9. Zoom in as necessary to read the text.

Tip

If you forget the keyboard shortcut for a forced line break, you can choose Type > Insert

Break Character > Forced Line Break.

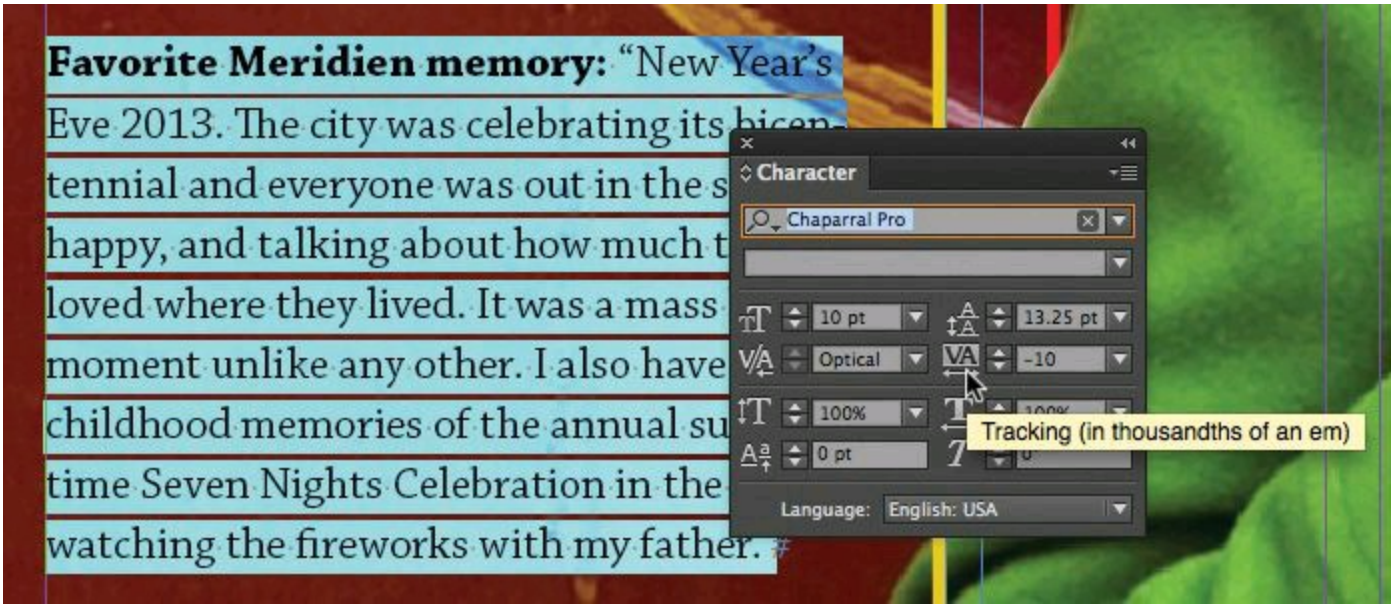
---

10. Using the Type tool, click right before the word "Urban" in the third paragraph of the sidebar text. Press Shift+Enter (Windows) or Shift+Return (Mac OS) to force "Urban" to the next line within the paragraph.

Next, you will fix the orphan in the last line of the sidebar using tracking, which adjusts the amount of space between selected characters.

11. Scroll down as necessary to view the last paragraph, which starts with "Favorite Meridien memory." Using the Type tool, click four consecutive times in the paragraph to select all the text.

12. Choose Type > Character to display the Character panel. Type **–10** in the Tracking box and press Enter or Return.



13. Choose Edit > Deselect All, then choose File > Save.

Tip

When the Type tool is loaded with multiple text files, press the arrow keys on the keyboard to change which text file is loaded for placement, and press Esc to remove a text file from the loaded text icon.

Loading the Type tool with multiple text files

In the Place dialog box, you can "load" the Type tool with multiple text files and then place them individually. Loading the Type tool works as follows:

- First, choose File > Place to open the Place dialog box.
- Ctrl-click (Windows) or Command-click (Mac OS) to select multiple, noncontiguous files. Shift-click to select a contiguous range of files.
- When you click Open, the loaded text icon shows in parentheses how many files are loaded, such as (4).
- Click to place the text files one at a time.

Flowing text manually

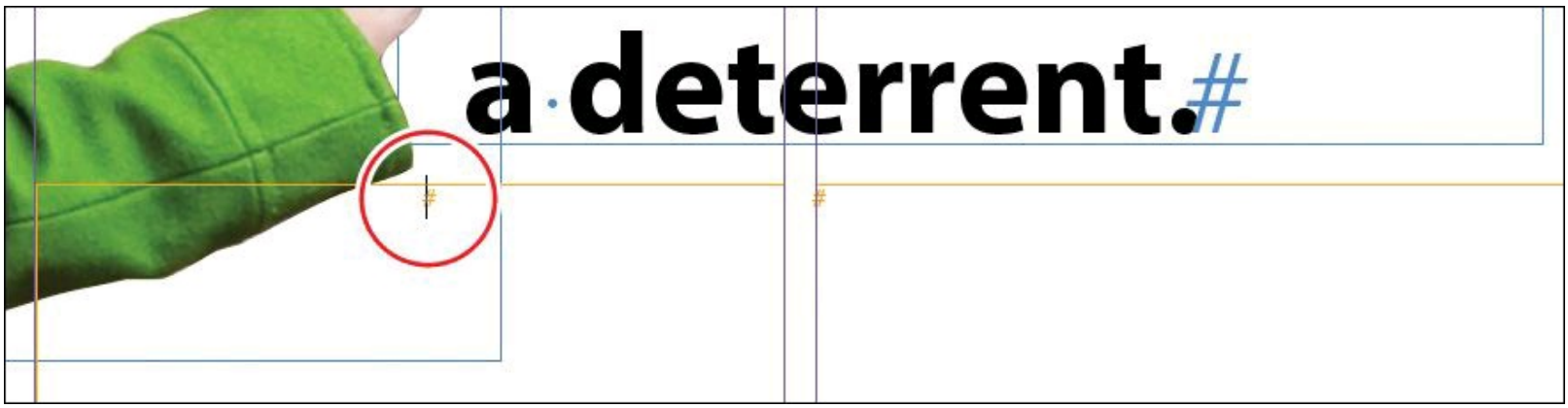
The process of taking an imported text file and flowing it across several connected text frames is called threading text. InDesign lets you flow text manually for greater control, flow text automatically to save time, and flow text while adding pages.

Tip

You can create columns by threading individual text frames or by dividing text frames into columns using the General tab of the Text Frame Options dialog box (Object menu). Some designers prefer separate text frames for more layout flexibility.

In this exercise, you will flow the feature article text into the two columns at the bottom of the right-facing page. First, you will select a Word file to import into the existing text frame in the first column. Second, you will thread the first text frame to the second text frame. Finally, you will create new text frames on the third page of the document to contain more of the text.

1. Choose View > Fit Spread In Window to locate the two text frames at the bottom of the right-facing page. Zoom in as necessary to view these text frames.
2. Using the Type tool ( ), click in the text frame at the left immediately below the woman's hand.



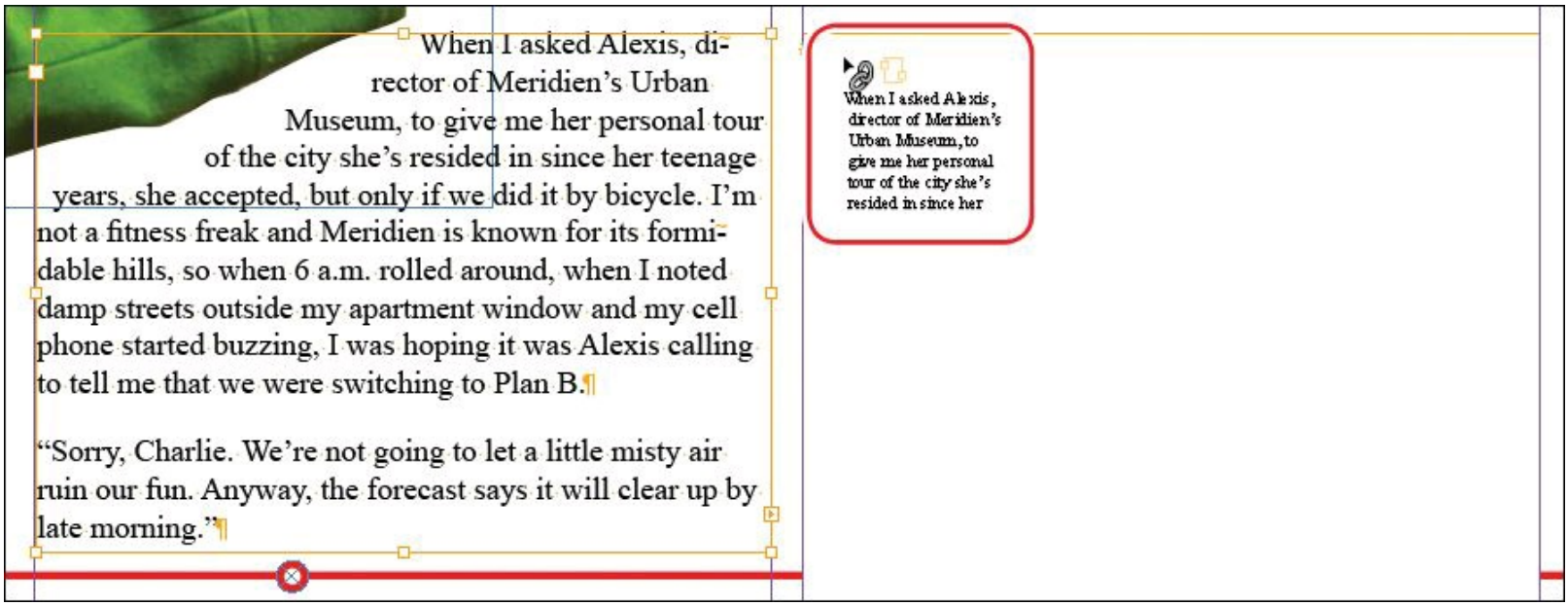
3. Choose File > Place.
4. Locate and select 05_Long_Biking_Feature_JanFeb2014.docx, in the Lesson05 folder.
5. Check Replace Selected Item at the bottom of the Place dialog box, and then click Open.

   The text flows into the existing frame in the left column. Notice that the text frame includes an out port in the lower-right corner. The red plus sign (+) indicates that some of the text you imported is overset, meaning that not all of the text fits into the existing text frame. You will now flow the additional text into another text frame in the second column.

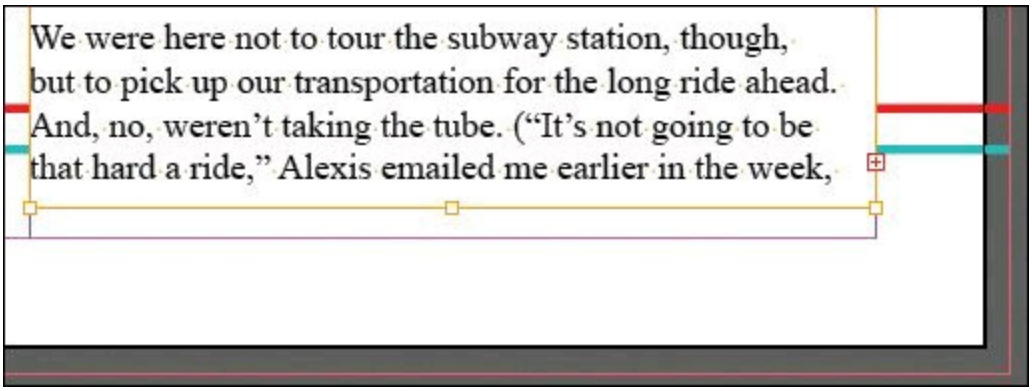
Tip

If you change your mind and decide you don't want to flow overset text, you can press Esc or click any tool in the Tools panel to cancel the loaded text icon. No text will be deleted.

6. Using the Selection tool ( ), click in the text frame's out port to load the text icon, as shown. (If necessary, first click the frame to select it, then click the out port.)



7. Position the loaded text icon ( ) anywhere in the text frame at the right and click.



Tip

As you flow text, the Selection tool's cursor changes to various loaded text icons.

The text flows into the second column. The out port in the text frame at the right contains a red plus sign (+), indicating that there is still overset text.

8. Choose File > Save. Leave the page in this position for the next exercise.

Creating text frames while flowing text

Now, you will try two different text flow methods. First, you will use semi-autoflow to place text into a column. Semi-autoflow lets you create threaded text frames one at a time. The pointer becomes a loaded text icon that automatically reloads after each column is placed. After that, you will use the

loaded text icon to manually create a text frame.

Tip

The loaded text icon changes slightly in appearance, depending on whether you are threading text manually or using semi-autoflow or autoflow.

---

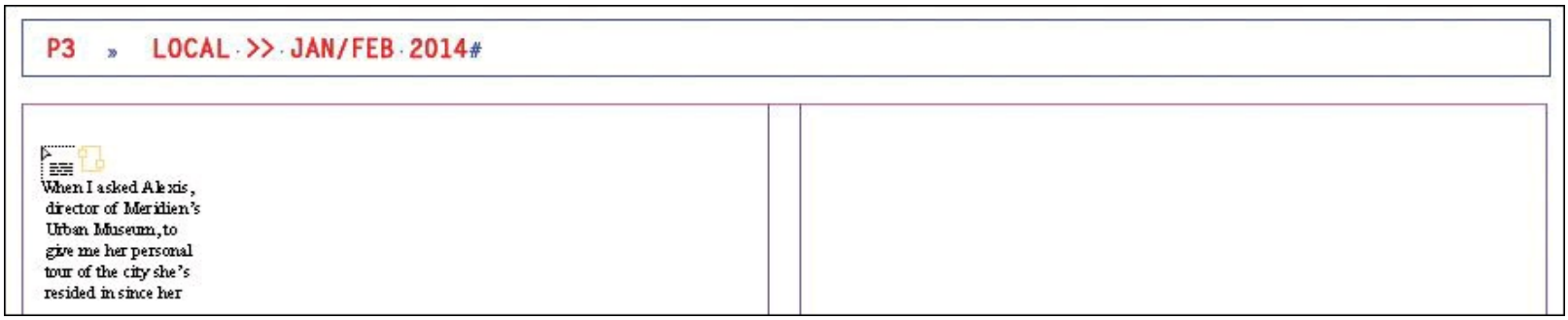
1. Using the Selection tool (), click the out port of the text frame in the second column on page 2. This loads the text icon with the overset text.

   You will create new text frames on page 3 to contain more of the text. Guides indicate where to place the text frames.

2. Choose Layout > Next Spread to display pages 3 and 4, then choose View > Fit Spread In Window.

   When the loaded text icon is active, you can still navigate to different document pages or add new pages.

3. Position the loaded text icon () in the upper-left corner where the guides intersect, as shown below. For proper placement, watch for the black arrow in the loaded text icon to turn white.



4. Hold down the Alt (Windows) or Option (Mac OS) key and click.

   The text flows into the first column. Because you held down Alt or Option, the pointer is still a loaded text icon, ready for you to flow text into another frame.

5. Release the Alt or Option key, and position the loaded text icon () in the second column indicated by the guides.

6. Drag to create a frame within the purple column guides in the right-hand column.

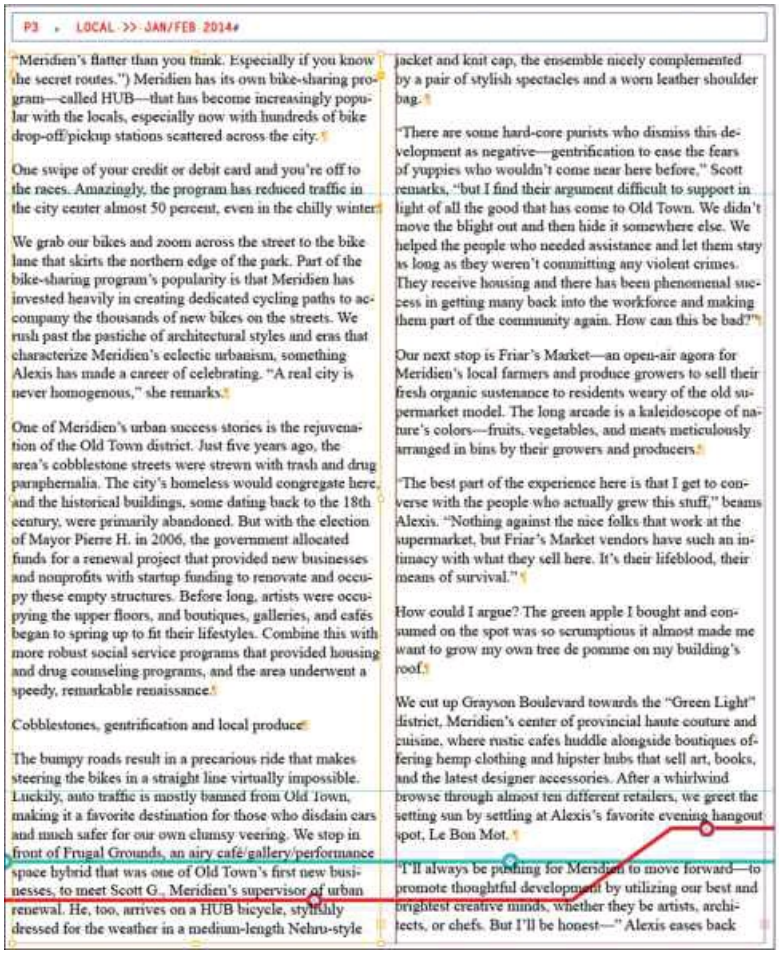
   A sketch of the design for this article shows that additional design elements will go above and below the two new columns. So you will adjust the height of the frames to fit within the horizontal cyan guides.

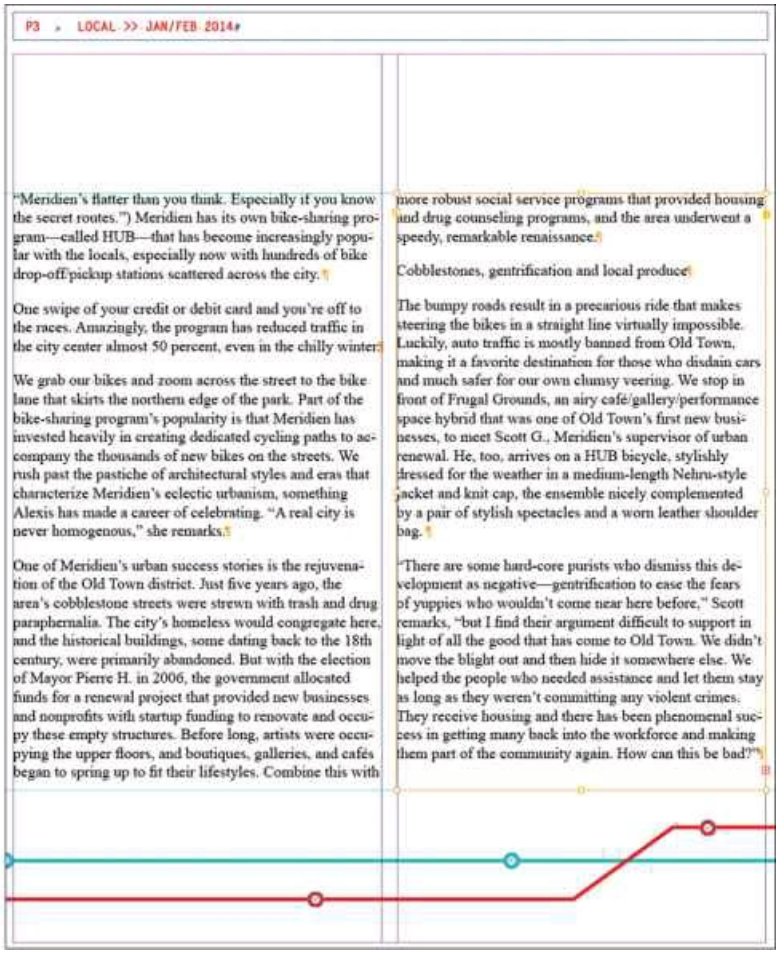
Note

The amount of text that fits in the frame may vary according to the specific font that is active on your system. In a print environment, it's important that everyone uses exactly the same fonts. For this lesson, the fonts in use are not important.

---

7. Using the Selection tool, drag the top and bottom of each text frame to fit within the cyan guides, as shown.





Clicking the loaded text icon creates text frames within the column guides and flows the text (left). You will manually reposition the columns as indicated by guides on the page (right).

Text remains overset, as indicated by the red plus sign (+), in the lower-right corner of the second text frame. You will fix this later.

8. Choose File > Save. Leave the page in this position for the next exercise.

Flowing text automatically

You will use autoflow to place the remaining text on the next spread. When you autoflow text, InDesign automatically creates new text frames within column guides on subsequent pages until all of the overset text is placed.

1. Using the Selection tool (), click the out port in the lower-right corner of the text frame in the second column on page 3. This loads the text icon with the overset text. (If necessary, first click the frame to select it, then click the out port.)
2. Choose Layout > Next Spread to display pages 5 and 6.
3. Position the loaded text icon () in the first column on page 5, roughly where the column and

margin guides intersect. (You will adjust the height of the frames later.)

Tip

When you create a text frame by clicking with the loaded text icon, InDesign creates the new text frame as wide as the column where you click. Although these frames are placed within the column guides, you can move, resize, and reshape these text frames as necessary.

---

4. Hold down the Shift key and click.

Notice that new text frames are added to pages 5 and 6 within the column guides. This is because you held down the Shift key to autoflow text. All of the text in the story is now placed. However, you will resize these text frames to fit within the horizontal cyan guides.

Tip

To adjust how text flows within frames, you can enter break characters such as Column Break and Frame Break (Type > Insert Break Character).

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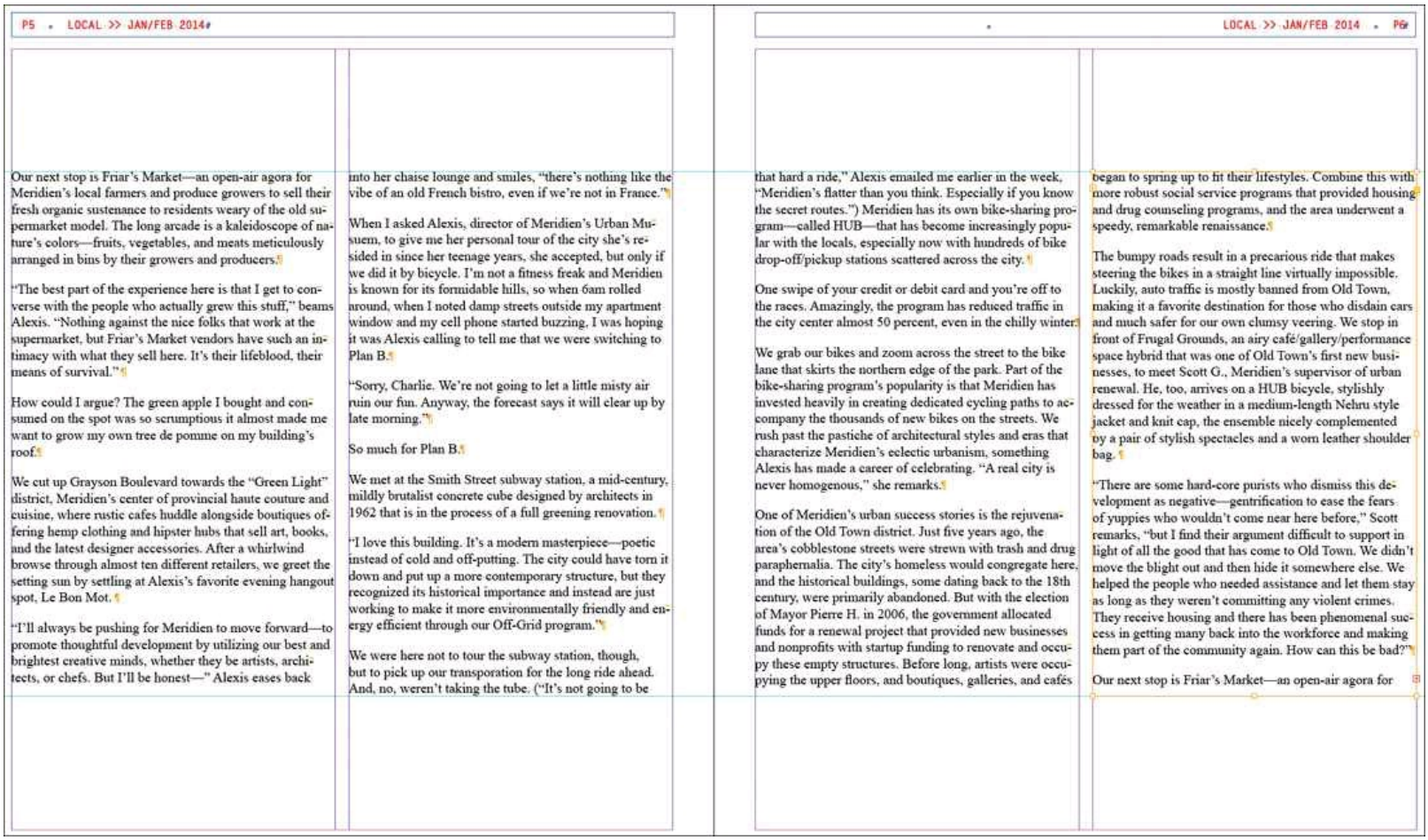
5. Using the Selection tool, drag the top and bottom of each text frame to fit within the cyan guides, as shown.



As you can see, the text is still overset.

6. Choose File > Save. Leave the page in this position for the next exercise.

Creating threaded frames automatically

To speed up the creation of column-width linked text frames, InDesign provides a shortcut. If you press the Right Arrow key as you drag the Type tool to create a new text frame, InDesign automatically divides the text frame into multiple threaded frames. For example, if you press the Right Arrow key once while creating a text frame, the text frame is divided once into two text frames of equal width. If you press the Right Arrow key five times, the text frame is divided five times, resulting in six columns of equal width.

Tip

In addition to threading frames to flow already placed text, you can pre-thread empty text frames. Using the Selection tool, click a frame's out port, then click anywhere in the next frame. Repeat this process until all the frames are threaded.

You will now add a page to the end of the document and flow the remaining overset text into a subdivided text frame.

1. Choose Window > Pages to display the Pages panel.
2. In the upper portion of the Pages panel, scroll to locate the FEA-2 Col Feature master spread.
3. Select the left-facing master page and drag it down to the lower portion of the Pages panel. Release the mouse button when the master page icon is positioned under page 5.
4. Double-click the page 7 icon to center the new page in the document window.
5. Select the Type tool ( ) and position it in the first column on page 7, roughly where the vertical purple guide and the horizontal cyan guide intersect.

Note

If you accidentally press the Right Arrow key more than once—producing more than two threaded text frames—choose Edit > Undo, then try again. You can also remove text frames by pressing the Left Arrow key as you drag.

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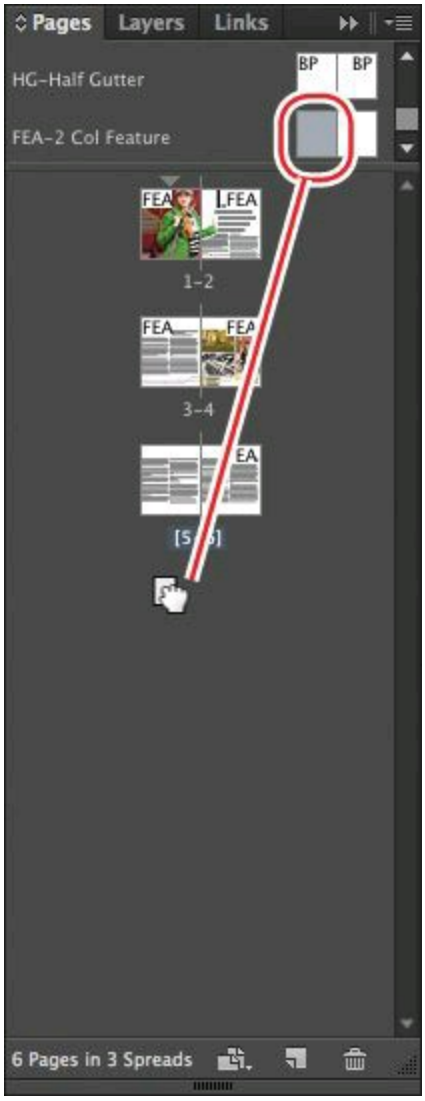
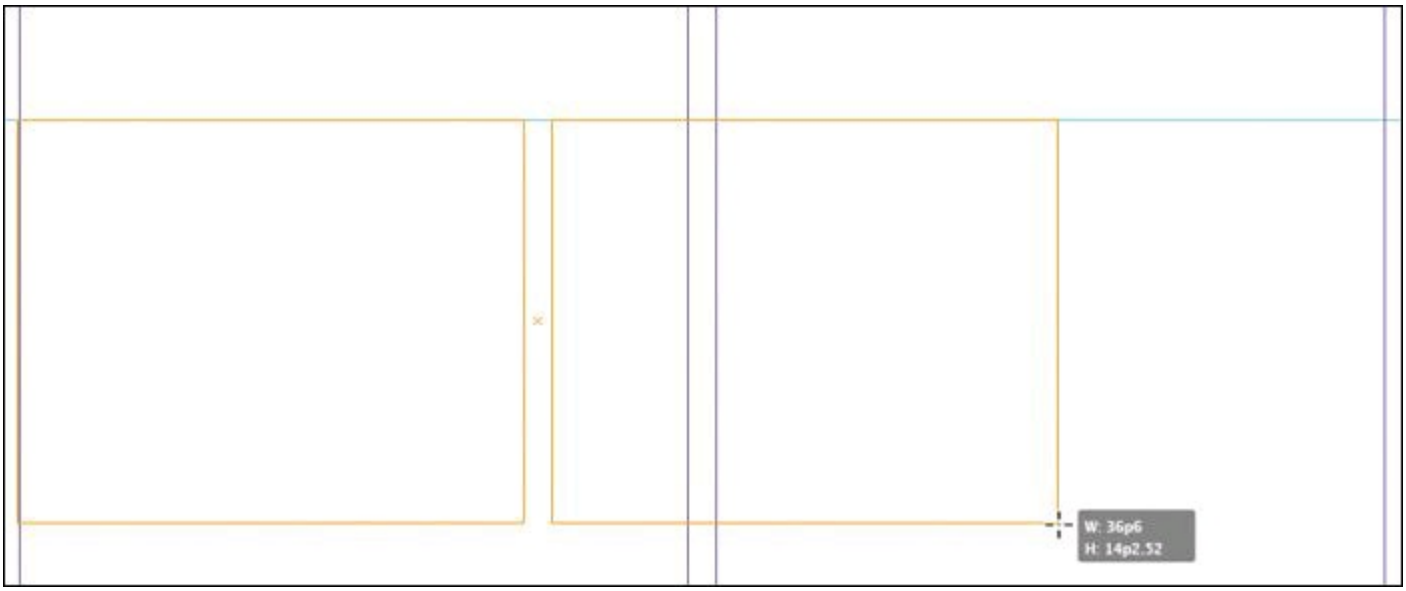
6. Drag the Type tool down and to the right to create a text frame that spans the width of both columns. As you drag, tap the Right Arrow key once.



InDesign automatically subdivides the text frame into two threaded text frames of equal width.



Tip

When the loaded text icon is over an empty text frame, a chain icon indicates that you can thread to that frame. You can also flow overset text into an empty graphics frame; the graphics frame is automatically converted to a text frame.

7. Scroll up to see the bottom of page 6.
8. Using the Selection tool ( ), click to select the text frame in the second column on page 6. Then, click its out port in the lower-right corner to load the text icon with the overset text.
9. Scroll down to page 7. Click the loaded text icon ( ) in the text frame in the first column.

   The text flows through the two linked text frames. If necessary, use the Selection tool to resize and reposition the two text frames within the column guides.
10. Choose File > Save. Leave the page in this position for the next exercise.

Resizing text frames automatically

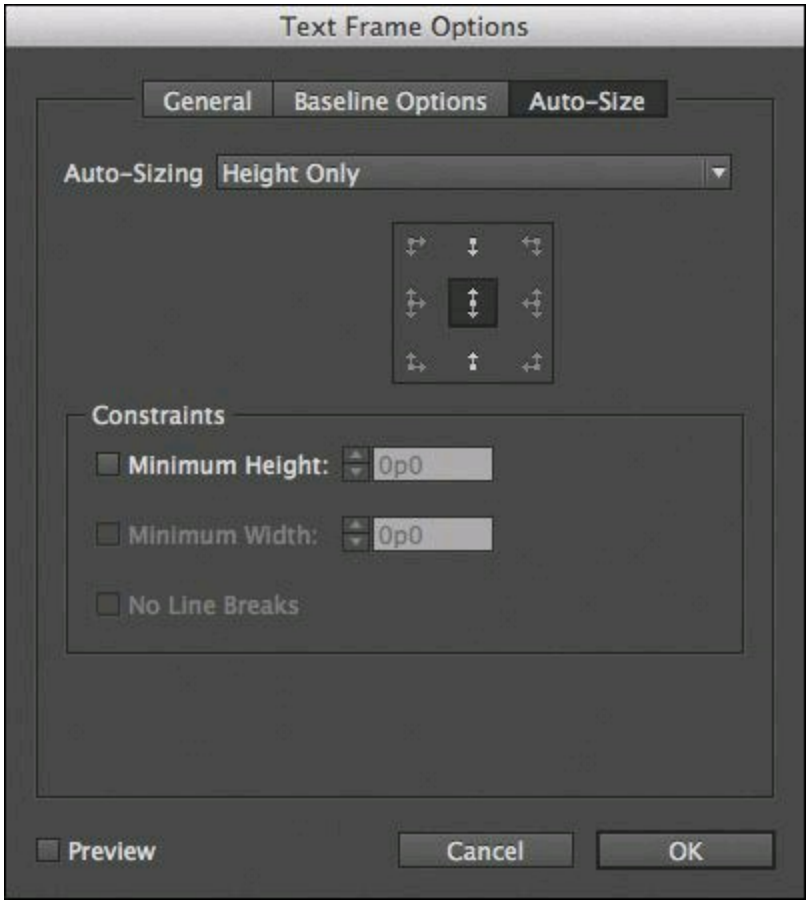
While adding, deleting, and editing text, you often end up resizing text frames. With the InDesign Auto-Size feature, you can specify that a text frame resize itself automatically according to your specifications.

Tip

The Auto-Size feature is ideal for individual text frames with a stroke and/or fill providing a boundary for the text (for example, a sidebar or coupon). If the text gets shorter, the frame gets smaller as well. If the text gets longer, it does not end up overset.

You will now use the Auto-Size feature to automatically adjust the size of the last text frame based on the length of the text.

1. Using the Selection tool ( ), click in the text frame in the second column at the right on page 7. Choose Object > Text Frame Options.
2. In the Text Frame Options dialog box, click the Auto-Size tab. From the Auto-Sizing menu, select Height Only.
3. Click the center icon in the top row ( ) to indicate that you want the text frame to “grow down” as if you were manually dragging the bottom handle of the text frame down. Click OK.



4. Using the Selection tool, click to select the text frame at the left. Drag the center handle on the bottom of the text frame up to decrease the frame's size.

   The text reflows to the second column and the size of that text frame automatically expands.

Tip

Once you place a file into a layout, the writers and editors should stop working on their copy of the file. This is because, by default, InDesign does not retain a link to a placed .docx file. Retaining and updating a link to the source text file could result in the loss of text formatting applied by the designer or create overset text. Therefore, any additional text edits are made by the designer in the InDesign layout.

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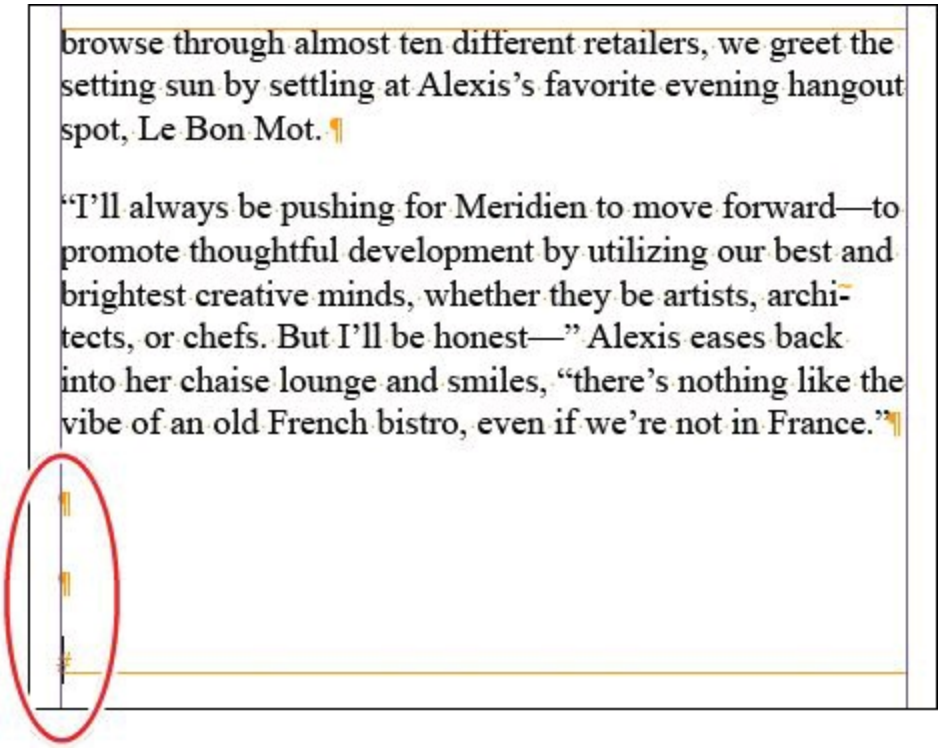
5. Using the Type tool (T), click at the end of the text after "France" and the period. Press Enter or Return multiple times to see how the text frame expands.
6. Leave the columns in any position you like—as long as there is no text overflow.
7. Choose Edit > Deselect All, then choose File > Save.



Adding pages while flowing text

In addition to threading text frames on existing pages, you can add pages while flowing text. This feature, called Smart Text Reflow, is ideal for flowing long passages of text such as book chapters. With Smart Text Reflow, flowing text or typing into a primary text frame automatically adds pages with threaded text frames to contain all the text. If text becomes shorter through editing or reformatting, any extra pages can be automatically deleted as well. To experiment with Smart Text Reflow:

1. Choose File > New > Document.
2. In the New Document dialog box, select Primary Text Frame. Click OK.
3. Choose Edit > Preferences > Type (Windows) or InDesign > Preferences > Type (Mac OS) to open the Type preferences.

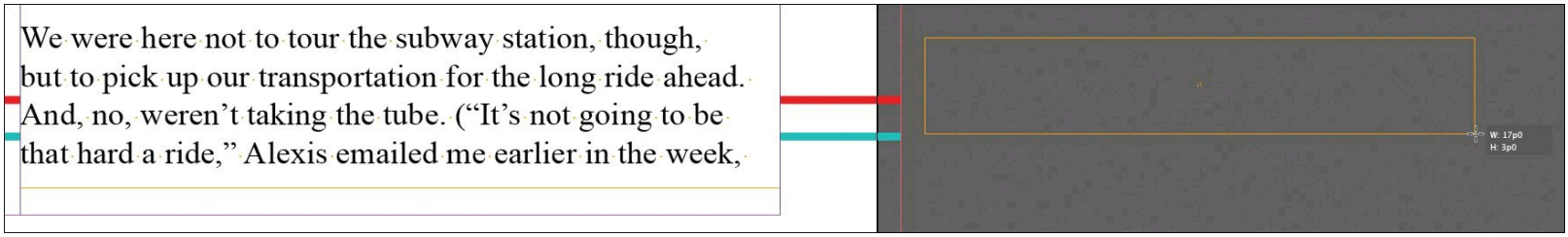
   The options in the Smart Text Reflow section of the Type preferences let you specify how pages are handled when you use Smart Text Reflow:

   - Where pages are added (to the end of a story, section, or document).
   - Whether Smart Text Reflow applies only to primary text frames or to other text frames in a document.
   - How pages are inserted into facing-page spreads.
   - Whether empty pages are deleted as text becomes shorter.
4. Smart Text Reflow is selected by default, but confirm that it is selected. Click OK.
5. Choose File > Place. In the Place dialog box, locate and select 05_Long_Biking_Feature_JanFeb2014.docx, in the Lesson05 folder, and click Open.
6. On the first page of the new document, click the loaded text icon within the page margins to flow all the text into the primary text frame, adding pages as necessary. Note the number of pages in the Pages panel.
7. Close the file without saving it.

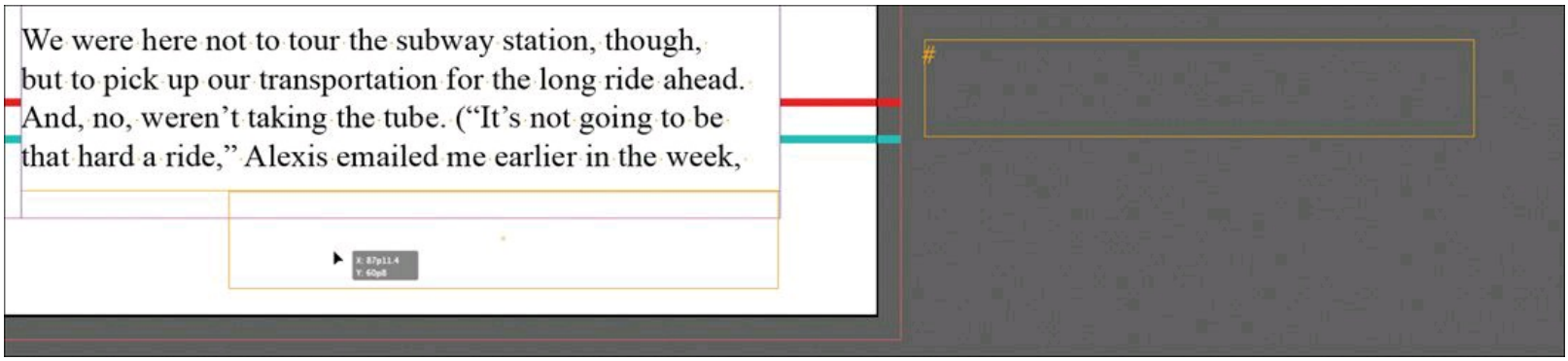
Adding a jump line page number

When a story continues across multiple pages, forcing readers to turn pages, it helps to add a jump line such as "(Continued on page x)." You can create jump lines in InDesign that automatically reflect the number of the next page in the text flow (that is, the next page the text frame is linked to).

1. Double-click the page 2 icon in the Pages panel to center the page in the document window. Scroll to the right to view a portion of the pasteboard. Zoom in as necessary to see the text.
2. Using the Type tool (T) and working on the pasteboard, drag to create a text frame that is approximately 17 by 3 picas.



3. Using the Selection tool (), drag the new text frame to the bottom of the second column on page 2. Be sure the top of the new text frame touches the bottom of the existing text frame.



4. Using the Type tool, click to place an insertion point in the new frame. Type **Bikes continued on** followed by a space.

Note

For the Next Page Number character to work properly, the text frame containing the jump line must touch or overlap the threaded frame.

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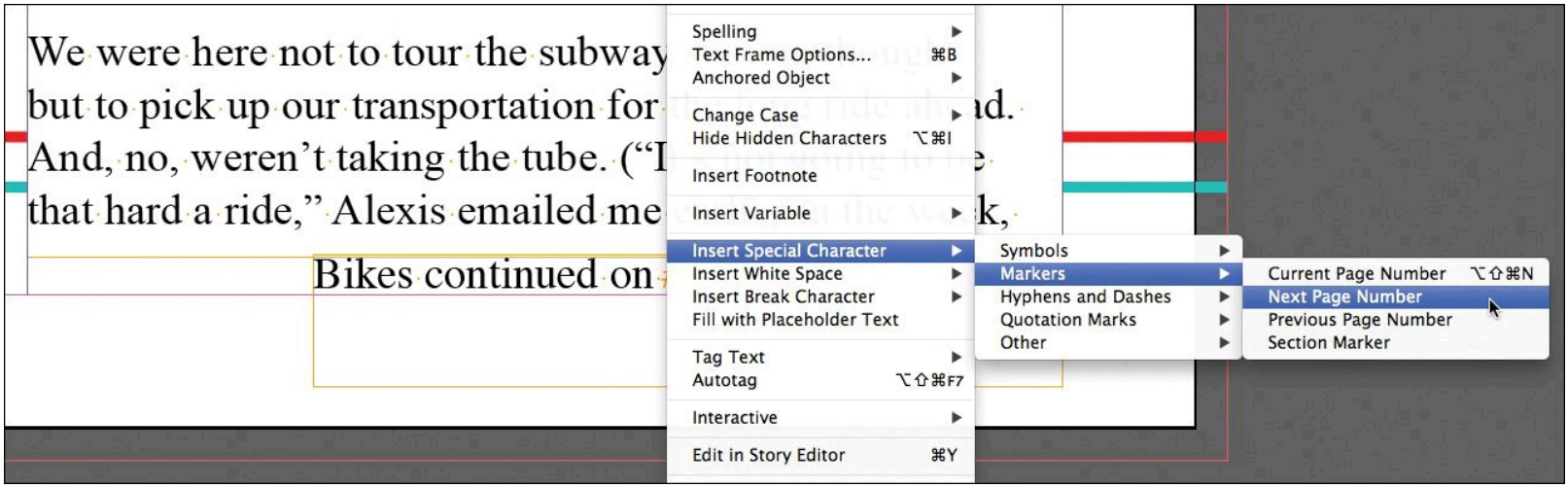
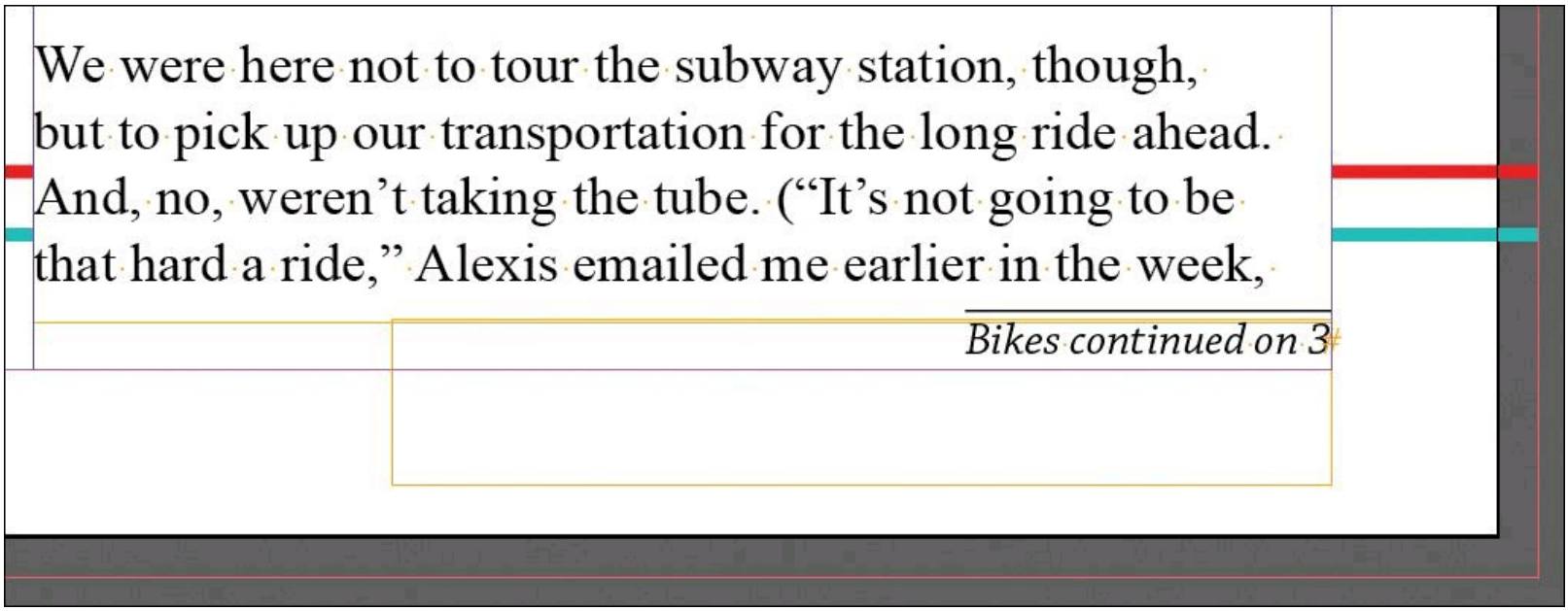
5. Choose Type > Insert Special Character > Markers > Next Page Number. The jump line now reads "Bikes continued on 3."



6. Choose Type > Paragraph Styles to open the Paragraph Styles panel. With the text insertion point still in the jump line, click the Continued From/To Line paragraph style to format the text according to the template.



7. Choose File > Save.
8. Choose View > Fit Spread In Window.
9. Choose Preview from the Screen Mode menu in the Application bar at the top of the screen.

Congratulations, you have finished the lesson.

Exploring on your own

In this lesson, you learned how to create a jump line that indicates the page number that a story continues on. You can also create a jump line that indicates the page number that a continued story came from.

Tip

Experiment with text-flowing options to find out what threading methods work best for you and your projects. For example, if you are creating a template for a catalog, you might thread several small text frames for item descriptions, and then flow the text later.

---

1. Using the Selection tool (), duplicate the text frame containing the jump line on page 2. (To duplicate an object, select it and choose Edit > Copy.)
2. Paste the jump line text frame on page 3. Drag the text frame so that it touches the top of the text frame in the first column.
3. Using the Type tool (), change the words in the text frame from "Bikes continued on" to "Bikes continued from."
4. Select the page number, 3, in the jump line.

   At this point, you need to replace the Next Page Number character with the Previous Page Number character.
5. Choose Type > Insert Special Character > Markers > Previous Page Number.

   The jump line now reads "Bikes continued from 2."

Review questions

1. Which tool lets you thread text frames?
2. How do you load the text icon?
3. What happens when you click the loaded text icon between column guides?
4. Which key do you press to automatically divide a text frame into multiple threaded frames?
5. What is the name of the feature that automatically adds pages and threaded text frames to contain all the text in an imported text file?
6. What feature automatically adjusts the size of a text frame based on the length of the text?
7. What do you need to do to ensure that the Next Page Number and Previous Page Number characters work in a jump line?

Review answers

1. The Selection tool.
2. Choose File > Place and select a text file, or click in an out port that contains overset text. You can also drag text files from the desktop onto a page.
3. InDesign creates a text frame where you click; the frame fits within the vertical column guides.
4. Press the Right Arrow key as you drag to create a text frame. (You can also press the Left Arrow key to decrease the number of columns as you create a text frame.)
5. Smart Text Reflow.
6. The Auto-Size feature, found in the Text Frame Options dialog box (Object menu).
7. The text frame containing the jump line must touch the threaded text frame containing the story.

6. Editing Text

Lesson Overview

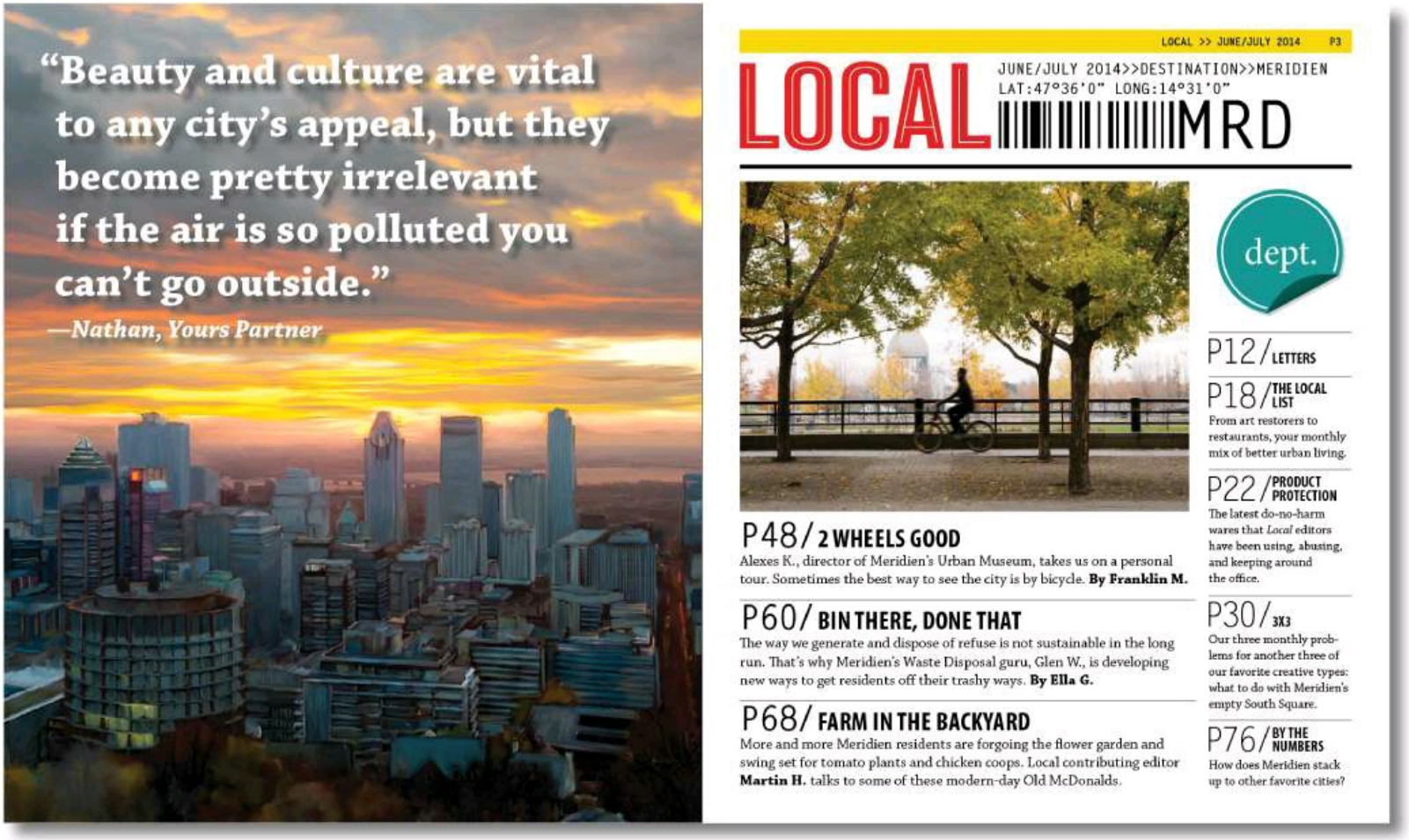
In this lesson, you'll learn how to do the following:

- Handle a missing font.
- Enter and import text.
- Find and change text and formatting.
- Check the spelling in a document.
- Edit a spelling dictionary.
- Automatically correct misspelled words.
- Move text by dragging and dropping.
- Use the Story Editor.
- Track text changes.

This lesson will take about 1 hour to complete.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the "Getting Started" section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.



InDesign offers many of the text-editing features you find in dedicated word-processing software, including the ability to search and replace text and formatting, check spelling, automatically correct spelling as you type, and track changes as you edit.

Getting started

In this lesson, you will be performing editorial tasks commonly expected of a graphic designer. These include importing a new story and using the editorial features in InDesign to search and replace text and formatting, check spelling, enter and track text changes, and more.

1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

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2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced.
3. Choose File > Open, and open the 06_Start.indd file in the Lesson06 folder, located inside the Lessons folder within the InDesignCIB folder on your hard disk.

Note

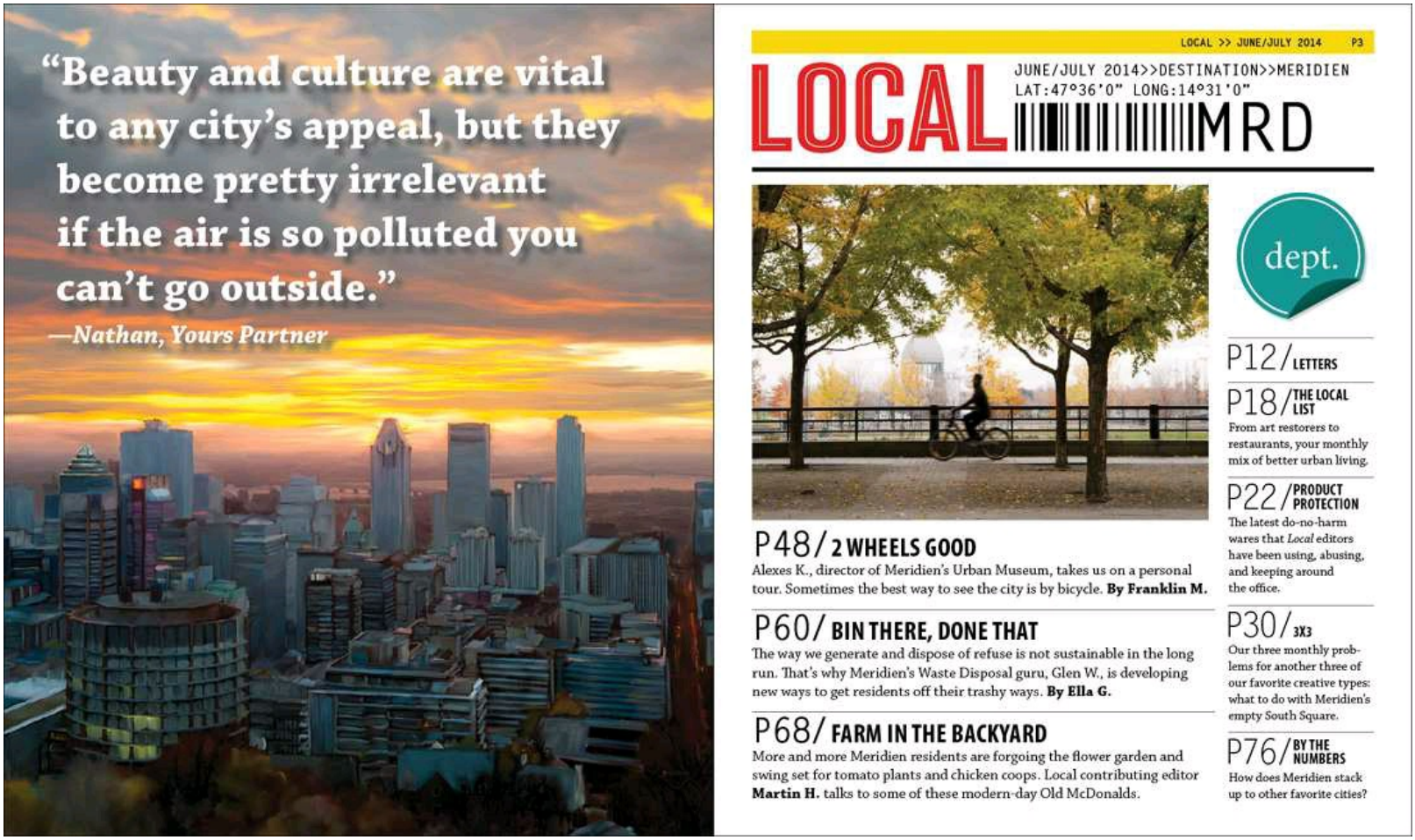
If Corbel Bold happens to be active on your system, this alert will not display. You can review the steps on replacing a missing font, then move on to the next section.

4. When the Missing Fonts alert displays, click Sync Fonts.

The Adobe Typekit online service will locate, download, and activate the missing Chaparral Pro fonts. The Corbel Bold font is not available through Adobe Typekit and will remain missing for now.

You will fix the problem of the missing Corbel Bold font in the next section by replacing it with a font that is installed on your system.

5. To display the document at a higher resolution, choose View > Display Performance > High Quality Display.
6. Choose File > Save As, rename the file **06_Text.indd**, and save it in the Lesson06 folder.
7. If you want to see what the finished document looks like, open the 06_End.indd file in the same folder. You can leave this document open to act as a guide as you work.



Tip

In general, it is not necessary to display images at full resolution when working with text. If you are working on a slower computer, you can leave the display at Typical Display or even gray out the images with Fast Display.

8. When you're ready to resume working on the lesson document, display it by clicking its tab in the upper-left corner of the document window.

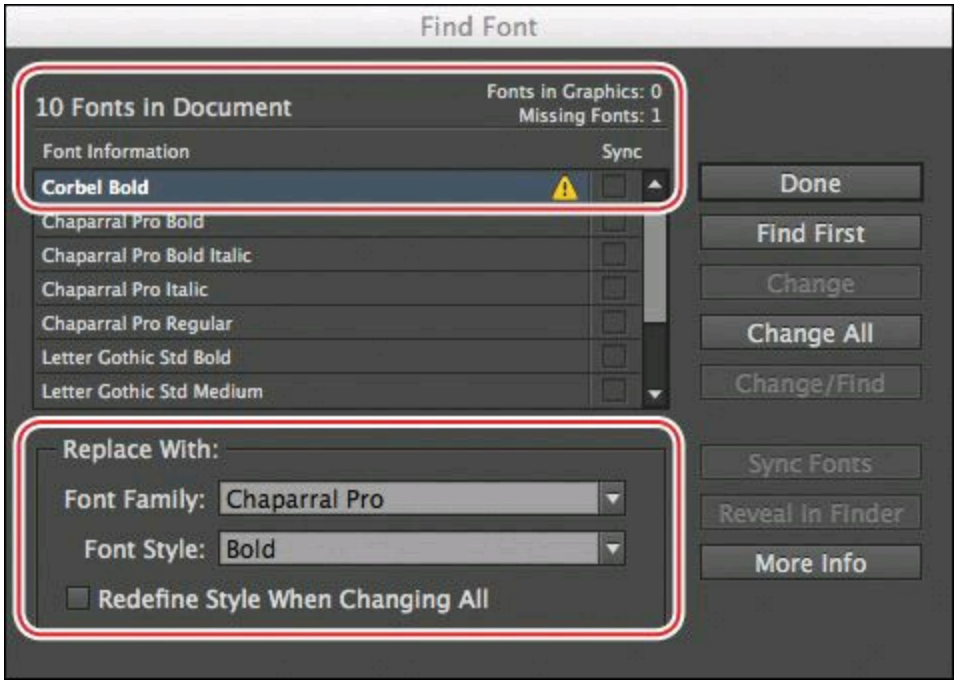
Finding and changing a missing font

When you opened the document in the previous exercise, the Corbel Bold font may have been listed as missing. If this font is active on your computer, you did not receive an alert message, but you can still follow the steps for future reference. You will now search for text that is formatted with the Corbel Bold font and replace it with the similar Chaparral Pro Bold font.

1. Notice that the pull quote on the left-facing page of the opening spread is highlighted in pink, indicating that the font is missing.
2. Choose Type > Find Font. The Find Font dialog box lists the fonts used in the document. An alert icon ( ) appears next to any missing fonts.
3. Select Corbel Bold in the Fonts In Document list.
4. For the Replace With option at the bottom of the dialog box, choose Chaparral Pro from the Font Family menu.
5. Type the word **Bold** in the Font Style field or choose Bold from the menu.

Tip

If you select Redefine Style When Changing All in the Find Font dialog box, any character styles or paragraph styles that specify the missing font will be updated to include the Replace With font as well. This can be handy for quickly updating documents and templates—as long as you're sure the font change is appropriate.



6. Click Change All.
7. Click Done to close the dialog box and see the replaced font in the document.
8. Choose File > Save.

Adding missing fonts

For most projects, you need to add the missing font to your system instead of substituting a different font. This maintains the original design and the way the text fits and flows. You can do this in the following ways:

- If you have the font, activate it.
- If you do not have the font, you can purchase it.
- If you are a Creative Cloud subscriber, you can see if the font is available for use through Adobe's Typekit font library (click Sync Fonts in the Find Font dialog box).

Once you have the font, you can use font management software to activate it. You can also add the font to your InDesign Fonts folder or a Document Fonts folder in the folder containing the InDesign document.

For more information on acquiring and using fonts, see Chapter 6, "Fonts," of *Real World Print Production with Adobe Creative Suite Applications,* by Claudia McCue (Peachpit, 2013).

Entering and importing text

You can enter text directly into your InDesign documents, or you can import text prepared in other

applications, such as word-processing software. To type text, you need to use the Type tool and select a text frame or text path. To import text, you can drag files from the desktop, drag files from the Mini Bridge panel (Window menu), "load" the cursor with multiple text files to import, or import text into a selected text frame.

Entering text

While graphic designers are not generally responsible for the text in all their layouts, they are often asked to enter edits from a marked-up hard copy or Adobe PDF. In this exercise, you will use the Type tool to make an addition to existing text.

1. Position the document onscreen so you can see the large pull quote on the left-facing page.
2. Choose View > Extras > Show Frame Edges. The text frames are outlined in gold so you can see them.
3. Choose View > Grids & Guides > Show Guides. Margin, column, and ruler guides display to help with object placement.
4. Using the Type tool (T), click after the word "Nathan" under the pull quote.
5. Type a comma, then **Yours Partner**.

6. Choose File > Save.

Importing text

When working with a template for a project such as a magazine, designers generally import article text into existing text frames. In this exercise, you will import a Microsoft Word file and apply body-copy formatting to it.

1. Choose Layout > Next Spread to display the second spread in the document window. Each page contains a text frame, ready to contain a story.
2. Using the Type tool (T), click in the far-left column of the text frame on the left-facing page.

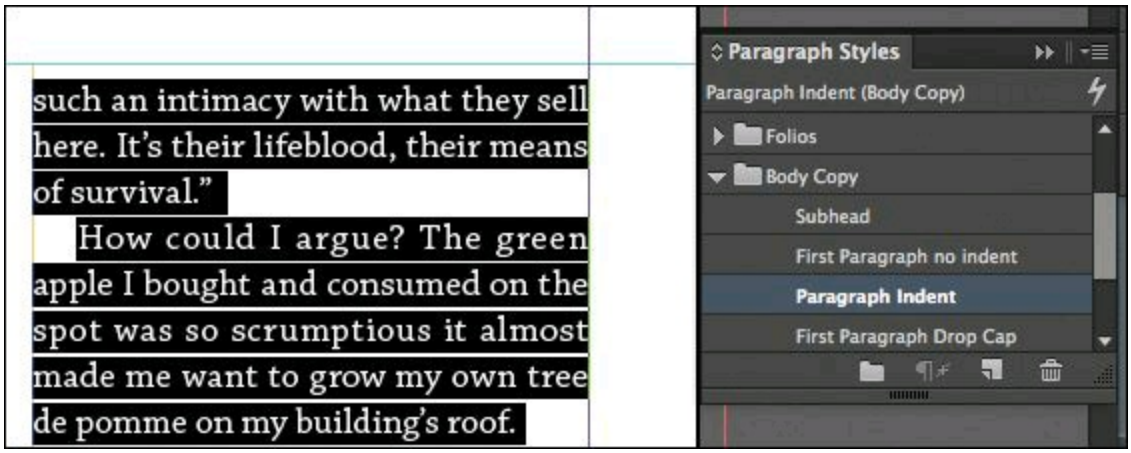
Tip

In the Place dialog box, you can Shift-click to select multiple text files. When you do this, the cursor is "loaded" with those files. You can then click in text frames or on the page to import the text from each file. This works well with content such as long captions that are saved in different text files.

---

3. Choose File > Place. In the Place dialog box, make sure Show Import Options is not selected.
4. Navigate to and select the Biking_Feature_JuneJuly2014.docx file in the Lesson06 folder, located inside the Lessons folder within the InDesignCIB folder on your hard disk.
5. Click Open.

   The text flows from column to column, filling both text frames.
6. Choose Edit > Select All to select all the text in the story.
7. Click the Paragraph Styles panel icon at the right to display the panel.
8. Click the triangle next to the Body Copy style group to display those styles.
9. Click the Paragraph Indent style to apply it to the selected paragraphs.



10. Choose Edit > Deselect All to deselect the text.

    Now that you have changed the formatting, the story no longer fits. In the lower-right corner of the text frame on the second page of the spread, you will see a red plus sign (+) indicating overset text (additional text). Later, you will use the Story Editor to resolve this.
11. Choose View > Extras > Hide Frame Edges.
12. Choose File > Save.

Finding and changing text and formatting

Like most popular word-processing software, InDesign lets you search and replace text and formatting. Often, while graphic designers are working on layouts, the copy is still being revised. When editors request global changes, Find/Change helps ensure accurate and consistent changes.

Finding and changing text

For this article, the fact checker discovered that the tour guide's name is not spelled "Alexis"—it's "Alexes." You will change all instances of her name in the document.

1. Using the Type tool ( ), click at the beginning of the story before "When I asked" (on the left-

facing page in the far left column).

2. Choose Edit > Find/Change. If necessary, click the Text tab at the top of the Find/Change dialog box to display the text search options.

Tip

You can toggle the search Direction by pressing Ctrl-Alt-Enter (Windows) or Command-Option-Return (Mac OS).

---

3. Click Forward for the search Direction.
4. Type **Alexis** in the Find What box.
5. Press Tab to navigate to the Change To box. Type **Alexes**.

The Search menu defines the scope of this search. Since you realize that "Alexis" may be used elsewhere in the document, such as in the table of contents or a caption, you need to search the entire document.

Tip

Using the Search menu in the Find/Change dialog box, you can choose to search All Documents, Document, Story, To End Of Story, or Selection.

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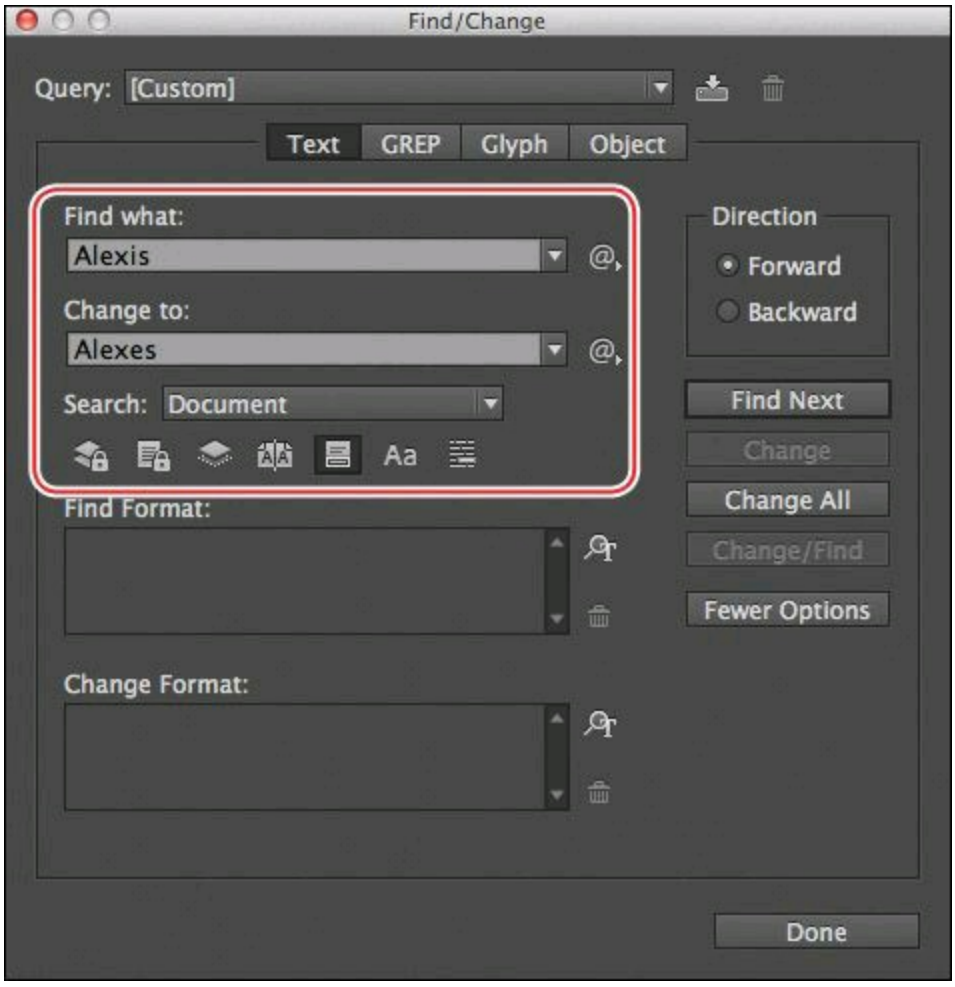
6. Select Document from the Search menu.



When using the Find/Change dialog box, it's always a good idea to test your settings. Find one

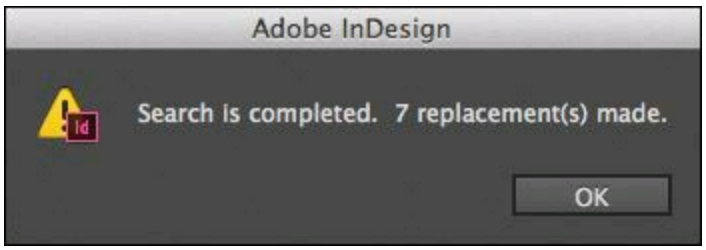
instance of the search criterion, replace it, and review the text before you make global changes. (Alternatively, you may opt to look at each instance with Find as you make the changes, so you can see how each change affects surrounding copy and line breaks.)

Tip

When the Find/Change dialog box is open, you can still click in the text and make edits with the Type tool. The Find/Change dialog box remains open so you can resume your search after editing the text.

---

7. Click Find Next. When the first instance of "Alexis" is highlighted, click Change.
8. Click Find Next, then click Change All. When the alert indicates that seven replacements were made, click OK. (If only six replacements were made, you may have forgotten to select Document from the Search menu.)



9. Leave the Find/Change dialog box open for the next exercise.

Finding and changing formatting

The editors request one more global edit to this article—this one formatting rather than spelling. The city's HUB bike program prefers to see its name in small caps rather than all caps. In this article, "HUB" was typed with three capital letters rather than being formatted with the All Caps type style. Because the Small Caps type style only works on lowercase letters, you will also need to change "HUB" to "hub," making this a case-sensitive change.

Tip

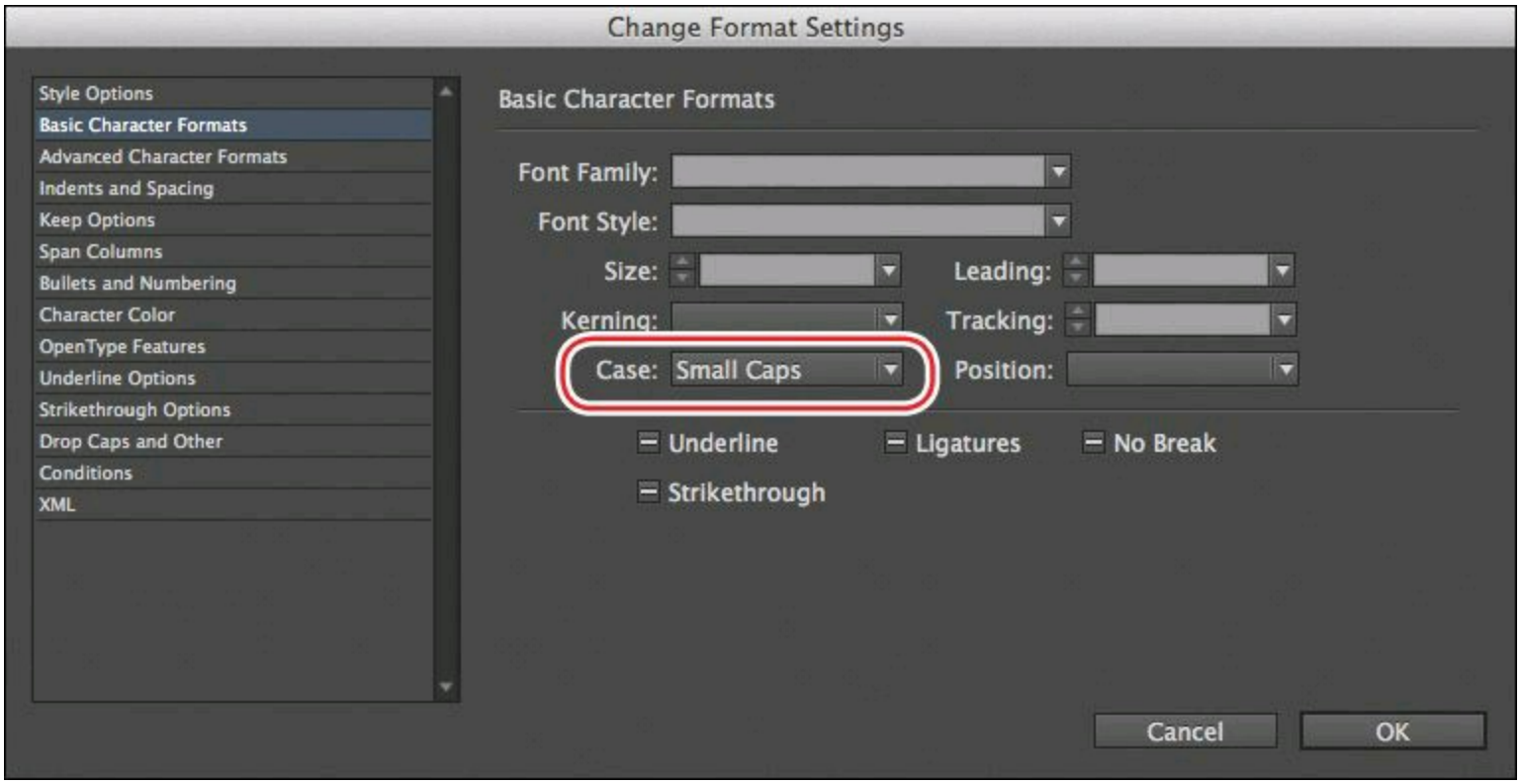
For acronyms and abbreviations, designers often prefer to use Small Caps style (abbreviated versions of capital letters) rather than All Caps style (all capital letters). The small caps are generally the same height as lowercase characters, and they blend into body copy better.

---

1. Type **HUB** in the Find What box.
2. Press Tab to navigate to the Change To box. Type **hub**.
3. Below the Search menu, click the Case Sensitive icon (Aa).
4. Point at each icon in the row below the Search menu to view its tool tip and see how it affects the Find/Change operation. For example, clicking the Whole Word icon ( ) ensures that instances of the Find What text within another word will not be found or changed. Do not change any of the settings.
5. If necessary, click the More Options button to display formatting options for the found text. In

the Change Format section at the bottom of the dialog box, click the Specify Attributes To Change icon ( ).

6. On the left side of the Change Format Settings dialog box, select Basic Character Formats. Then, in the main part of the dialog box, choose Small Caps from the Case menu.

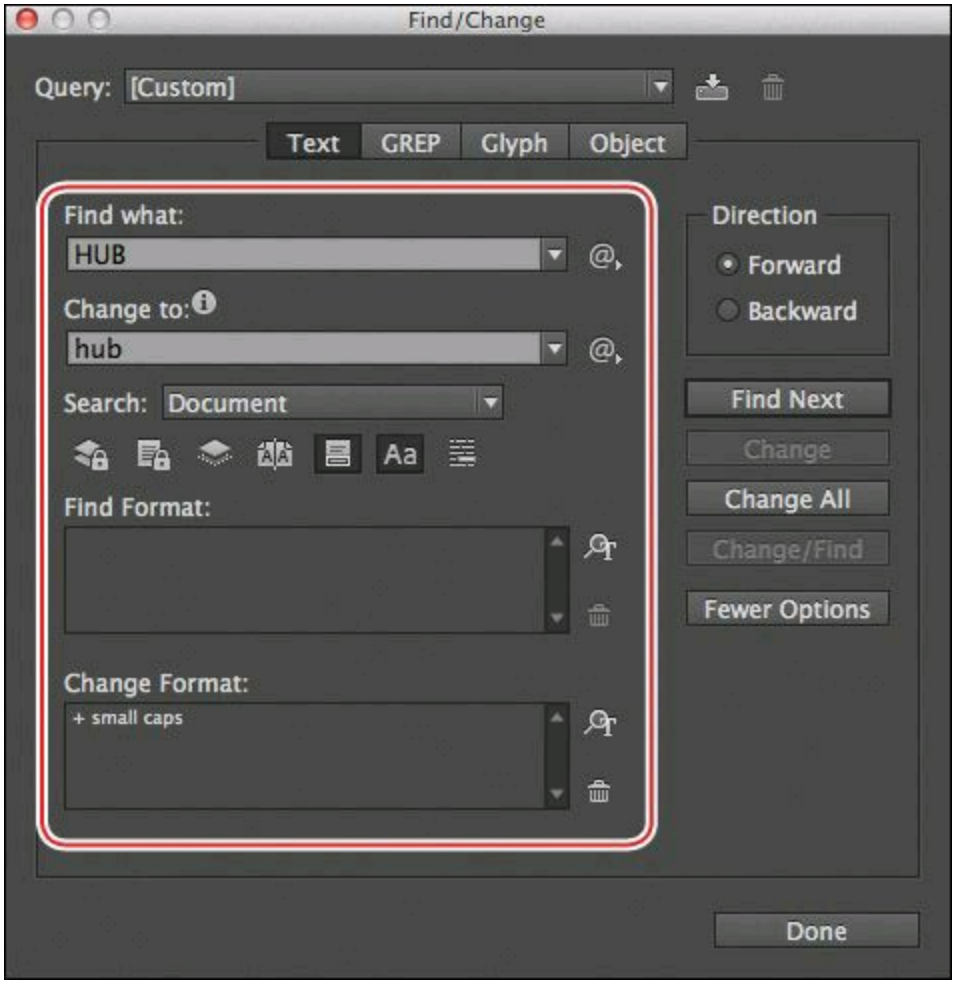


Note

If you are unhappy with the results of Find/Change, you can choose Edit > Undo to undo the last "change" operation, whether it was Change, Change All, or Change/Find.

7. Leave the other options blank, then click OK to return to the Find/Change dialog box.

Notice the alert icon ( ) that appears above the Change To box. This icon indicates that InDesign will change text to the specified formatting.



8. Test your settings by clicking Find Next, then Change. Once you confirm that "HUB" changes to "HUB," click Change All.
9. When the alert indicates how many changes were made, click OK. Click Done to close the Find/Change dialog box.
10. Choose File > Save.

Checking spelling

InDesign has features for checking spelling that are similar to the options in word-processing programs. You can check the spelling in selected text, an entire story, all the stories in a document, or all the stories in several open documents at once. To customize which words are flagged as possible misspellings, you can add words to your document's dictionary. In addition, you can have InDesign flag possible spelling issues and correct spelling as you type.

Tip

Be sure to discuss with your client or editor whether you should be the one checking spelling in InDesign. Many editors strongly prefer to check spelling themselves.

Checking spelling in the document

Before a document is ready for print or electronic distribution, it's a good idea to check spelling. In this case, we suspect the newly imported story may be a little sloppy, so you will check the spelling now before you start designing the layout.

1. If necessary, choose View > Fit Spread In Window to view both pages of the second spread in the document.
2. Using the Type tool (T), click before the first word of the article you've been working on: "When."
3. Choose Edit > Spelling > Check Spelling. Select Story from the Search menu, and click Start.

Tip

Using the Search menu in the Check Spelling dialog box, you can choose to check All Documents, Document, Story, To End Of Story, or Selection.

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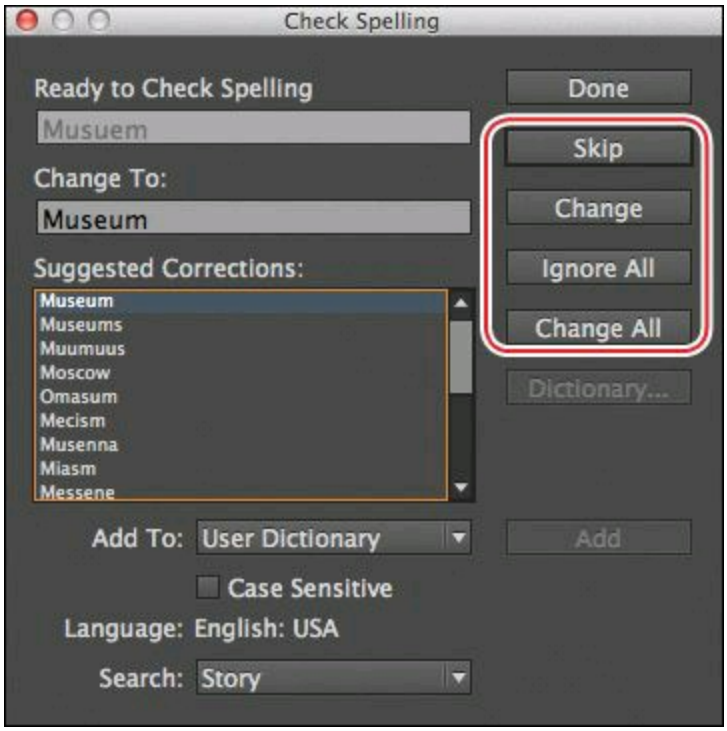
4. InDesign highlights the first occurrence of "Alexes." Click Ignore All.
5. Click Ignore All when "Meridien's" is flagged.
6. When the word "Musuem" is flagged, scan the choices in the Suggested Corrections list. Select "Museum" and click Change.



Tip

The check-spelling features will check the overset text in addition to the text that fits in the text frames.

---

7. Handle the remaining possible spelling issues as follows:
   - 6am: Click in the Change To field and type **6 a.m.** and click Change.
   - brutalist: Click Skip.
   - transporation: Type **transportation** in the Change To box and click Change.
   - homogenous: Select "homogeneous" in the Suggested Corrections list and click Change.
   - For any other words that are flagged, click Skip.

Note

Depending on the state of your InDesign Preferences file, different words may be flagged. Simply experiment with the various Check Spelling options to get familiar with them.

---

8. Click Done.
9. Choose File > Save.

Adding words to a document-specific dictionary

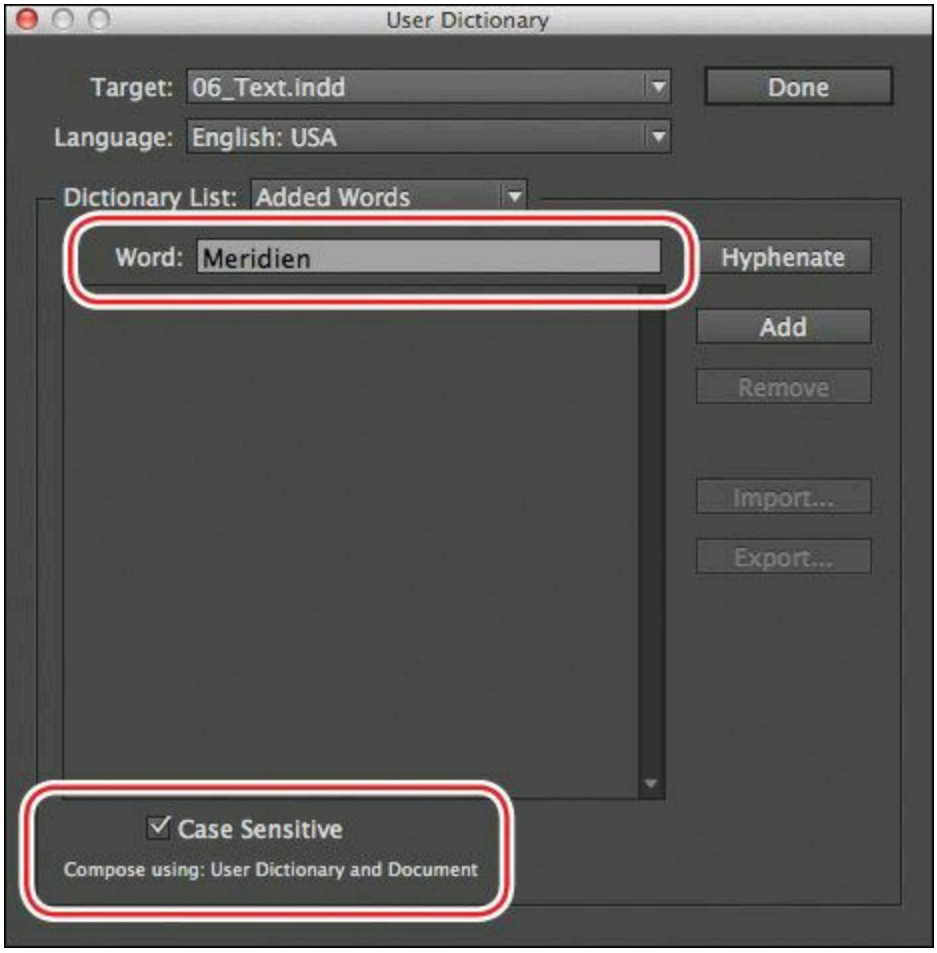
With InDesign, you can add words to your user dictionary or to a documentspecific dictionary. If you work with multiple clients who may have different spelling preferences, for example, it is better to add words to a document-specific dictionary. In this case, you will add “Meridien” to the document’s dictionary.

Tip

If a word is not specific to one language—such as a person’s name—you can choose All Languages to add the word to every language’s spelling dictionary.

---

1. Choose Edit > Spelling > User Dictionary to display the User Dictionary dialog box.
2. Select 06_Text.indd from the Target menu.
3. Type **Meridien** in the Word box.
4. Select Case Sensitive to add only “Meridien” to the dictionary. This ensures that a lowercase use of “meridien” is still flagged when you check spelling.



5. Click Add, then click Done.
6. Choose File > Save.

Checking spelling dynamically

It's not necessary for you to wait until a document is finished before checking the spelling. Enabling dynamic spelling allows you to see misspelled words in text.

1. Choose Edit > Preferences > Spelling (Windows) or InDesign > Preferences > Spelling (Mac OS) to display Spelling preferences.
2. In the Find section, select the possible errors you want highlighted.

Tip

In the Find section of Spelling preferences, you can customize what the Check Spelling dialog box flags as possible errors: Misspelled Words, Repeated Words, Uncapitalized Words, Uncapitalized Sentences. For example, if you're working on a directory with hundreds of names, you might want to select Uncapitalized Words but not Misspelled Words.

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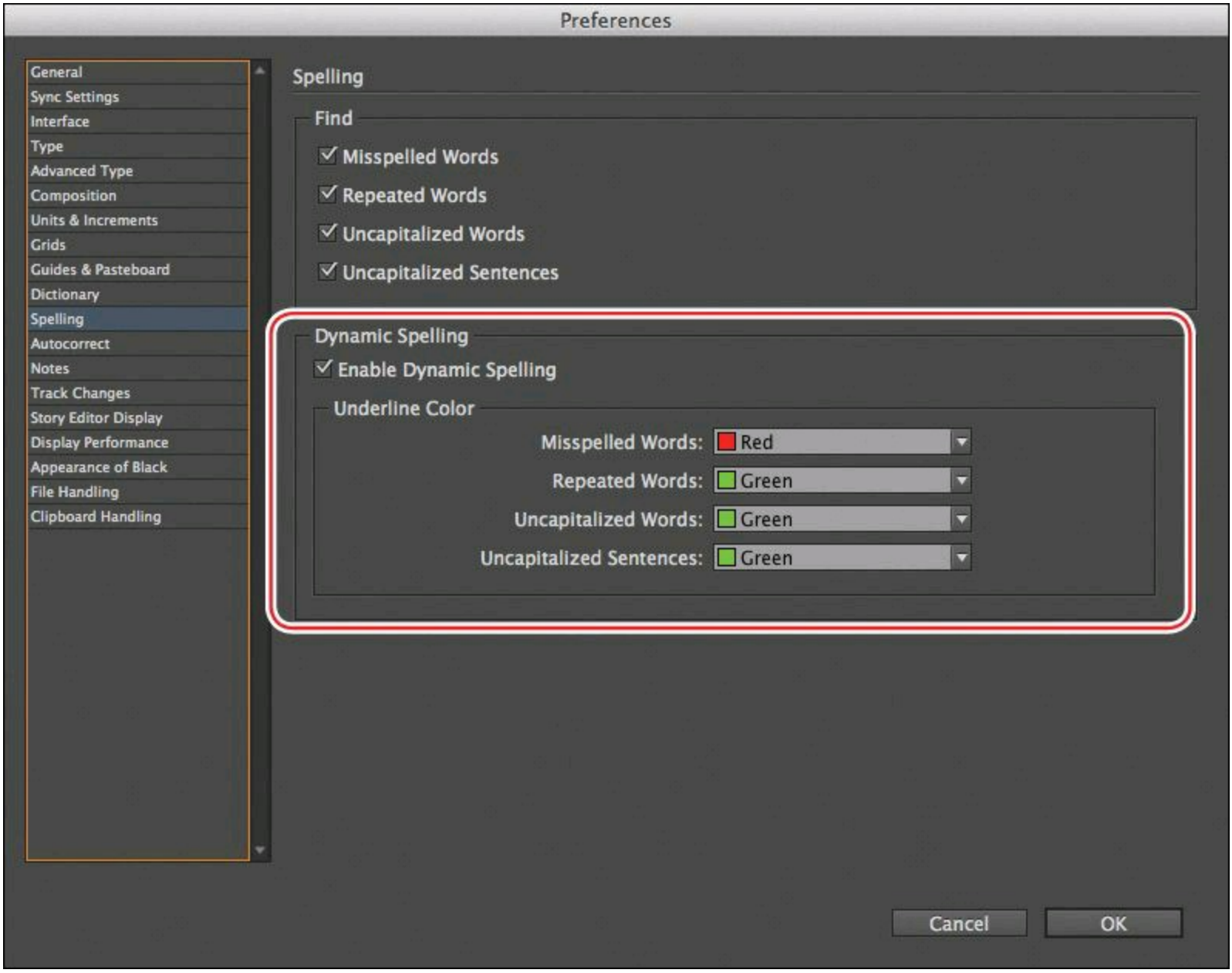
3. Select Enable Dynamic Spelling.
4. In the Underline Color section, use the menus to customize how possible errors are signified.



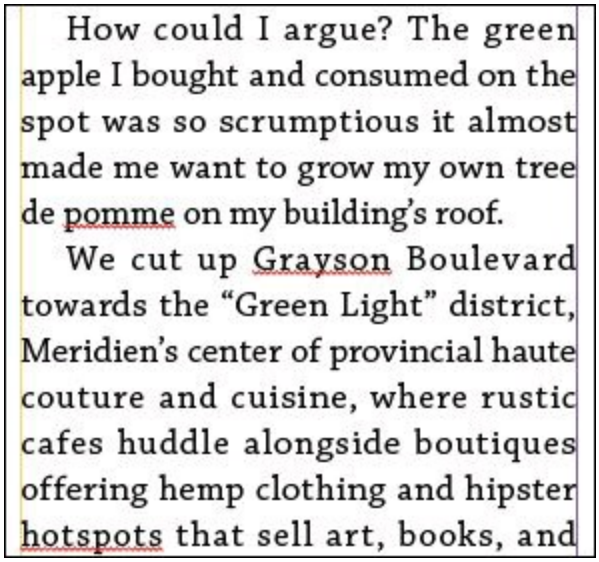
5. Click OK to close the Preferences dialog box and return to your document.

Tip

Right-click (Windows) or Control-click (Mac OS) a word flagged by dynamic spelling to display a contextual menu from which you can select an option to change the spelling.

Words that may be misspelled words (according to the default user dictionary) are now underlined.

6. Using the Type tool ( ), click in the text and type a word incorrectly to see the underline. To remove the word, choose Edit > Undo.
7. Choose File > Save.



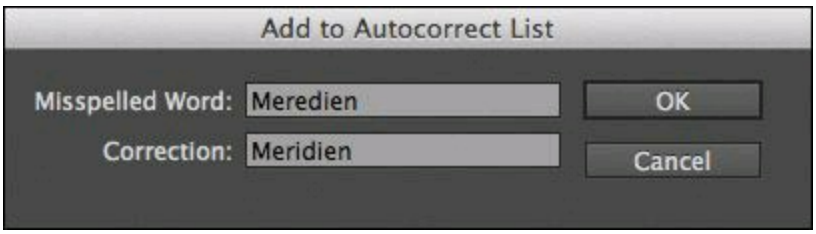
Automatically correcting misspelled words

Autocorrect takes the concept of dynamically checking spelling to the next level. With Autocorrect activated, InDesign automatically corrects misspelled words as you type them. Changes are made based on an internal list of commonly misspelled words. You can add other commonly misspelled words, including words in other languages, to this list if you like.

1. Choose Edit > Preferences > Autocorrect (Windows) or InDesign > Preferences > Autocorrect (Mac OS) to display Autocorrect preferences.
2. Select the Enable Autocorrect option.

   By default, the list of commonly misspelled words is for English: USA.
3. Change the language to French and note the commonly misspelled words in that language.
4. Try other languages, if you'd like. Change the language back to English: USA before proceeding.

   The editors have realized that the name of their city, "Meridien," is frequently typed as "Meredien," with an "e" in the middle rather than an "i." You will prevent this mistake by adding the misspelling and correct spelling to the Autocorrect list.
5. Click Add. In the Add To Autocorrect List dialog box, type **Meredien** in the Misspelled Word box and **Meridien** in the Correction box.



6. Click OK to add the word, and then click OK again to close the Preferences dialog box.
7. Using the Type tool ( ), type the word **Meredien** followed by a space anywhere in the text.
8. Notice that Autocorrect changes the spelling from "Meredien" to "Meridien," then choose Edit > Undo until the word you added is deleted.
9. Choose File > Save.

Editing text by dragging and dropping

To quickly cut and paste words in your document, InDesign allows you to drag and drop text within the same story, between frames, and between documents. You'll now use drag and drop to move text from one paragraph to another in the magazine layout.

Tip

When you drag and drop text, by default InDesign automatically adds and deletes spaces before and after words as necessary. If you need to turn off this feature, deselect Adjust Spacing Automatically When Cutting And Pasting Words in Type preferences.

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1. Choose Edit > Preferences > Type (Windows) or InDesign > Preferences > Type (Mac OS) to display Type preferences.
2. In the Drag And Drop Text Editing section, select Enable In Layout View. This option lets you drag and drop text in Layout view rather than just in the Story Editor. Click OK.
3. Choose Type > Show Hidden Characters to see the spaces.
4. In the document window, scroll to the first spread in the document. Adjust the view scale as necessary so you can read the far-right column in the table of contents on the right-facing page.

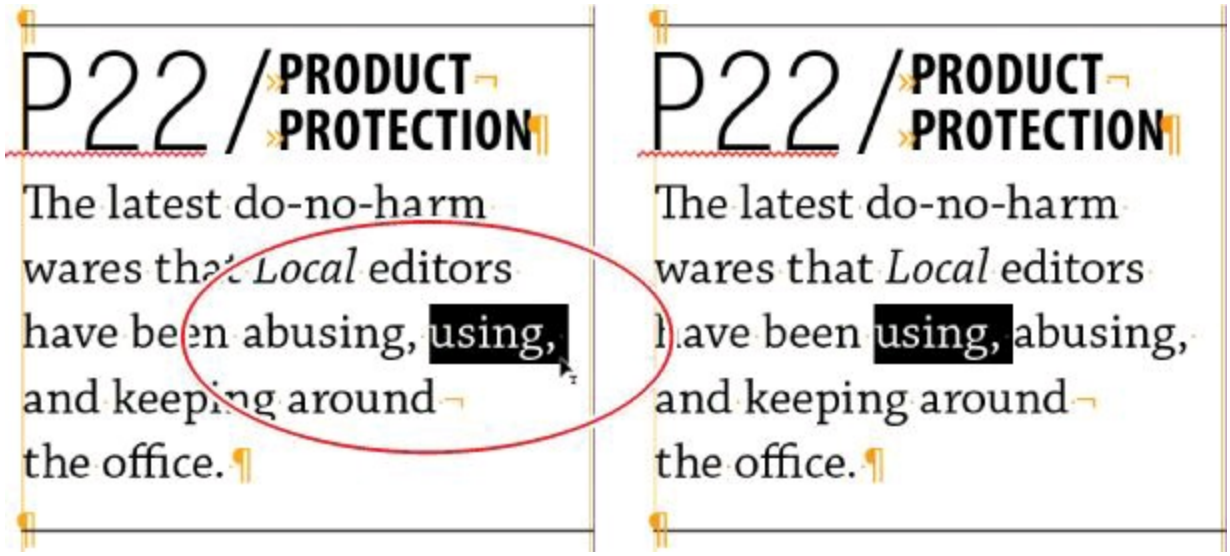
   Next to P22/Product Protection, the common phrase "using, abusing" is transposed as "abusing, using." You will quickly reverse this with drag and drop.
5. Using the Type tool (T), drag to select "using" along with the comma and space after it.
6. Position the I-bar pointer over the selected word until the pointer changes to the drag and drop icon ().

Tip

If you want to copy a selected word instead of moving it, hold down the Alt (Windows) or Option (Mac OS) key after you start dragging.

---

7. Drag the word to its correct location before the word "abusing."



8. Choose File > Save.

Using the Story Editor

If you need to enter many text edits, rewrite a story, or cut a story, you can isolate the text with the Story Editor. The Story Editor window works as follows:

- It shows plain text with no formatting applied. Any graphics and other nontext elements are omitted to make editing easier.
- The column to the left of the text displays a vertical depth ruler and the name of the paragraph style that is applied to each paragraph.
- Dynamic spelling (if enabled) highlights misspelled words, just like in the document window.
- If the Enable In Story Editor option is selected in Type preferences, you can also drag and drop text in the Story Editor, just as you did in the previous exercise.
- In Story Editor Display preferences, you can customize the font, size, background color, and more for the Story Editor window.

The article on the second spread does not fit into the two text frames available. To fix this, you will edit the text with the Story Editor.

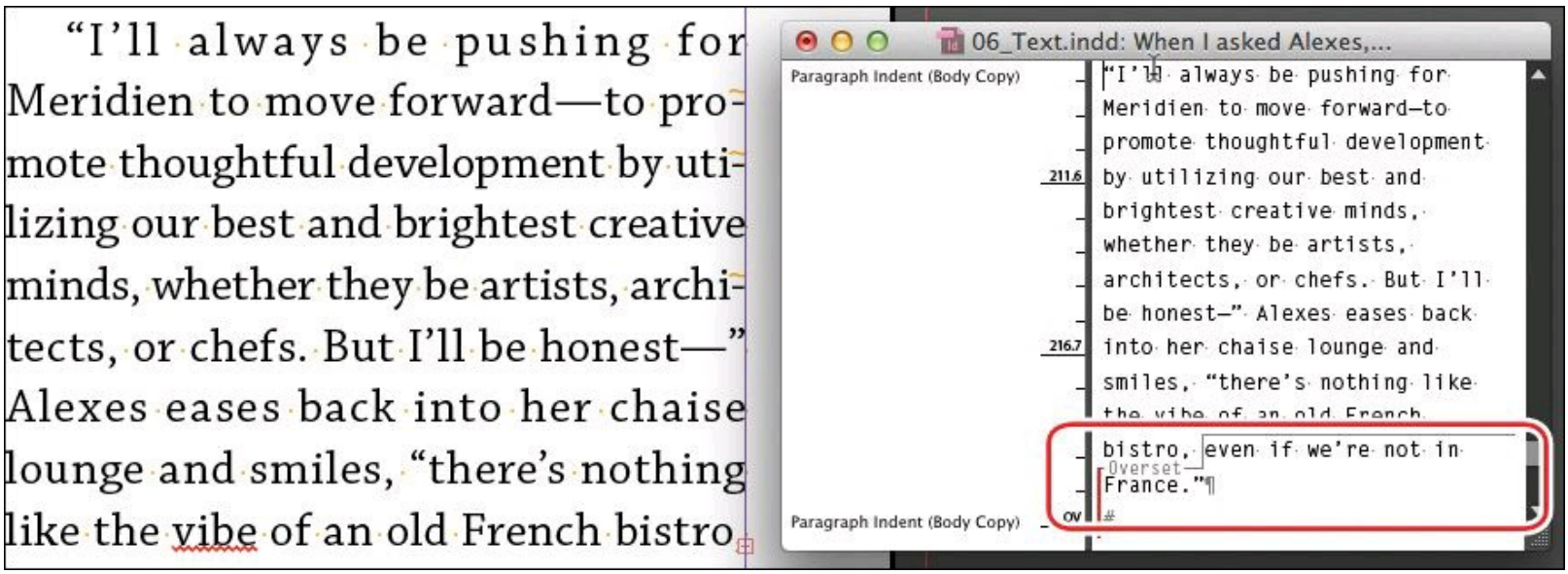
1. Choose View > Fit Spread In Window.
2. Scroll down to the second spread in the document. Using the Type tool ( ), click in the last paragraph of the story.

Note

If the Story Editor window goes behind the document window, you can bring it to the front by choosing its name from the bottom of the Window menu.

---

3. Choose Edit > Edit In Story Editor. Position the Story Editor window next to the far-right column on the spread.
4. Drag the vertical scroll bar in the Story Editor to the end of the story. Note the line that indicates the overset text.



5. In the last paragraph, click after "creative minds" and type a period.

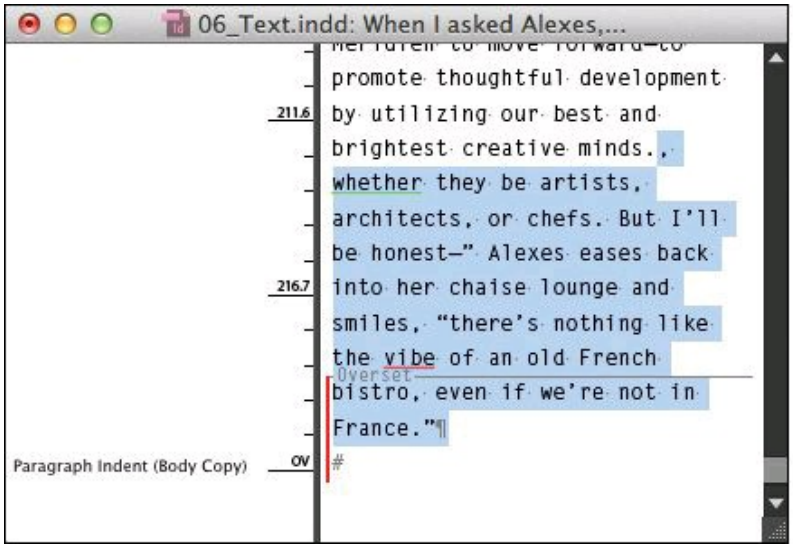
Note

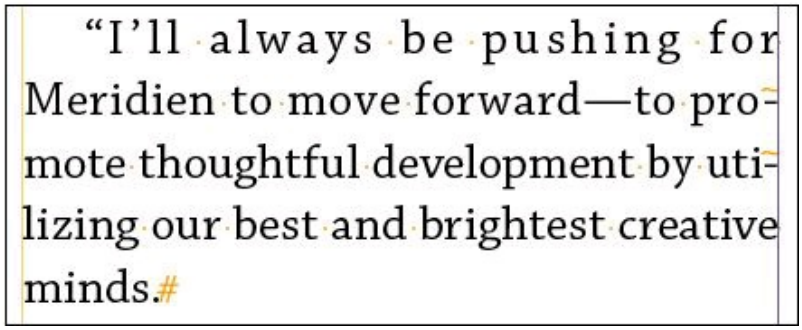
If necessary, delete the final paragraph return after the word "France" so the text is no

longer overset.

6. Select the remainder of the text, including the final paragraph return. Press Backspace or Delete.

   Notice the effect on the layout—the story is no longer overset.

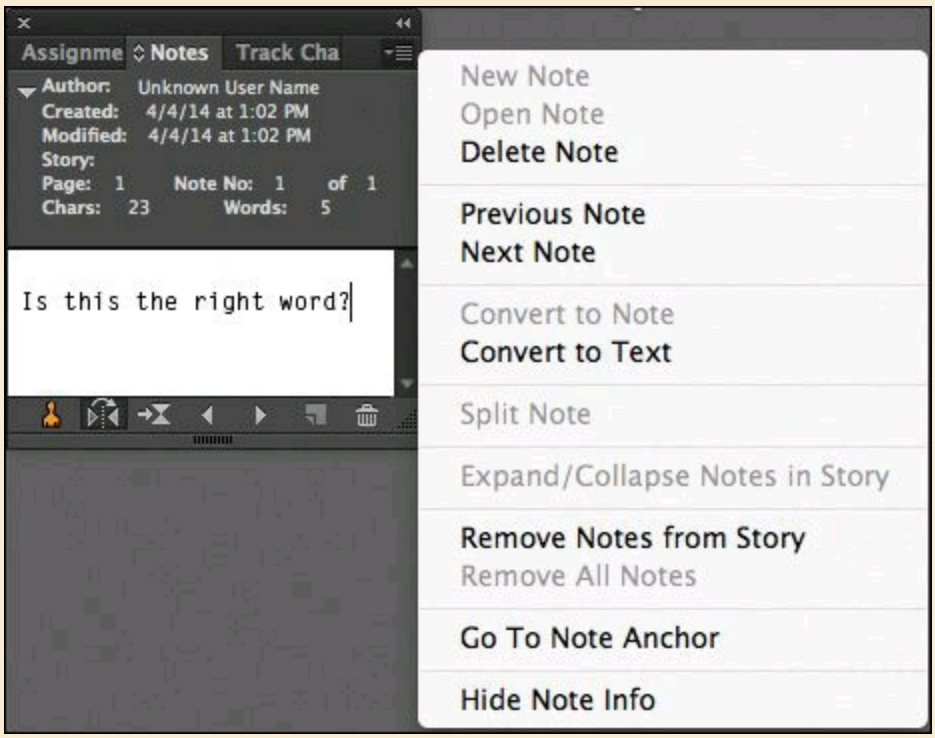




7. Click the Story Editor window's close box.
8. Choose File > Save.

Inserting notes and tracking changes

InDesign provides a Notes panel and a Track Changes panel for reviewing and collaborating on documents (Window > Editorial). The panel menus provide access to many of the features. For Track Changes, you can also use options in the Type menu.



Tracking changes

For some projects, it's important to see what changes are made to the text throughout the design and

review process. In addition, reviewers may suggest changes that another user can accept or reject. As with a word-processing program, you can track text that is added, deleted, or moved using the Story Editor.

In this document, we will make a suggestion for a change to the table of contents, then accept that change so it's no longer tracked.

1. Scroll up to the first spread in the document. Using the Type tool (T), click in the first table of contents entry: "P48/2 Wheels Good."
2. Choose Edit > Edit In Story Editor. Position the Story Editor window next to the table of contents.

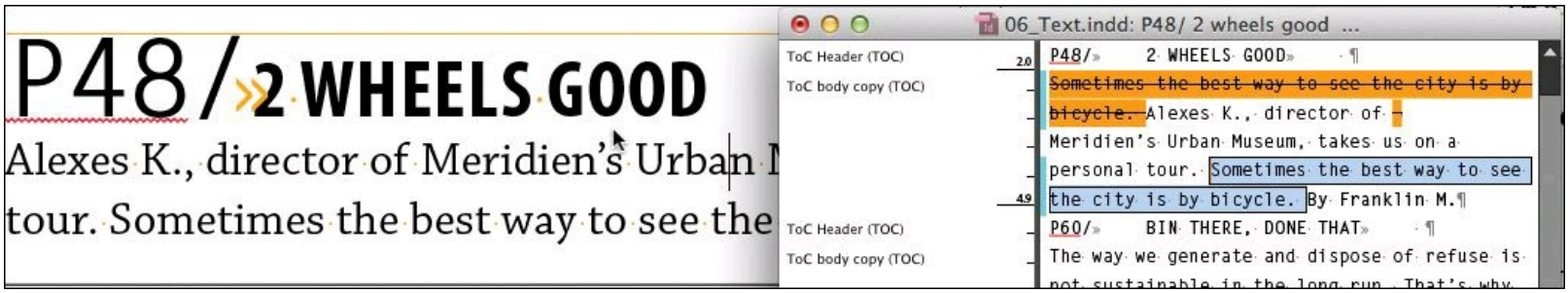
Tip

In Track Changes preferences, you can customize which changes are tracked and how the changes display in the Story Editor.

---

3. Choose Type > Track Changes > Track Changes In Current Story.
4. In the Story Editor window, select the first sentence: "Sometimes the best way to see the city is by bicycle." Include the space after the period in the selection.
5. Cut and paste or drag and drop the selected sentence to after the second sentence: "Alexes K., director of Meridien's Urban Museum, takes us on a personal tour."

   Notice how the changes are marked in the Story Editor window.



6. With the Story Editor window still open, choose Type > Track Changes and review the options for accepting and rejecting changes.
7. Once you have reviewed the possibilities, choose Accept All Changes > In This Story.
8. When the alert dialog box displays, click OK.
9. Click the Story Editor window's close box.
10. Choose File > Save.

Congratulations. You have finished the lesson.

Exploring on your own

Now that you have tried the basic text-editing tools in InDesign, experiment with them more to edit and format this document.

1. Using the Type tool (T), create a new text frame above the story on the second spread. Type in a headline and format it with the Control panel.
2. If you have additional text files on your system, try dragging them from the desktop to the layout

to see how they're imported. Choose Edit > Undo if you don't want to keep them in the document.

3. Review all the styles available in the Paragraph Styles panel. Experiment with applying them to text in the story.
4. Add subheads to the story and apply the Subhead paragraph style to them.
5. Use the Find/Change dialog box to find all em dashes in the story and replace them with an em dash with a space on either side of it.
6. Edit the story using the Story Editor and Track Changes. See how the different changes are marked, and experiment with accepting and rejecting the changes.
7. Experiment with changing Spelling, Autocorrect, Track Changes, and Story Editor Display preferences.

Review questions

1. Which tool lets you edit text?
2. Where are most of the commands for editing text?
3. What is the search-and-replace feature called?
4. While checking the spelling in a document, InDesign flags words that are not in the dictionary—but they may not actually be misspelled. How can you fix this?
5. If you seem to continually type a word incorrectly, what can you do?

Review answers

1. The Type tool.
2. The Edit menu and the Type menu.
3. Find/Change (Edit menu).
4. Add those words to the document's or InDesign's default spelling dictionary for the language or languages of your choice (Edit > Spelling > User Dictionary).
5. Add the word to your Autocorrect preferences.

7. Working with Typography

Lesson Overview

In this lesson, you'll learn how to do the following:

- Customize and use the baseline grid.
- Adjust vertical and horizontal text spacing.
- Change fonts and type styles.
- Insert special characters from OpenType fonts.
- Create a headline that spans multiple columns.
- Balance the text in columns.
- Hang punctuation outside a margin.
- Add and format a drop cap.
- Adjust line breaks.
- Specify a tab with a leader and create a hanging indent.
- Add a rule to a paragraph.

This lesson will take about 1 hour to complete.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the "Getting Started" section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.

DINING

RestaurantProfile

Assignments Restaurant

Sure, you can get Caesar salad prepared tableside for two at any of the higher-end restaurants in town—for $25 plus another $40 (just for starters) for a single slab of steak. Or, you can visit Assignments Restaurant, run by students of the International Culinary School at The Art Institute of Colorado, where tableside preparations include Caesar salad for $4.50 and steak Diane for $19. No, this isn't Elway's, but the chefs in training create a charming experience for patrons from start to finish.

Since 1992, the School of Culinary Arts has trained more than 4,300 chefs—all of whom were required to work in the restaurant. Those chefs are now working in the industry all over the country, says Chef Instructor Stephen Kleinman, CEC, AAC. "Whether I go to a restaurant in Manhattan or San Francisco, people know me," Kleinman says, describing encounters with former students. Although he claims to be a "hippie from the '60s," Kleinman apprenticed in Europe, attended a culinary academy in San Francisco and had the opportunity to cook at the prestigious James Beard House three times. He admits that his experience lends him credibility, but it's his warm, easygoing, approachable style that leads to his success as a teacher.

"Some of the best restaurants in the world serve tableside; chefs are more grounded this way," claims Kleinman, who would never be mistaken for a snob. "By having the students come to the front of the house—serving as waitpeople and preparing dishes tableside—we break a lot of barriers."

IF YOU GO

Name ..... Assignments Restaurant
Address ..... 675 S. Broadway, Denver
Reservations ... call 303-778-6625 or visit www.opentable.com
Hours ..... Wednesday–Friday, 11:30 a.m.–1:30 p.m. and 6–8 p.m.

THE RESTAURANT

Assignments Restaurant, tucked back by the Quest Diagnostics lab off South Broadway near Alameda Avenue, seats 71 at its handful of booths and tables. The blissful quiet, a welcome change from the typical hot spot, is interrupted only by solicitous servers dressed in chef attire. Despite decor that is on the edge of institutional with its cream-colored walls, faux cherry furniture and kitschy cafe artwork, this is a spot that welcomes intimate conversation with friends and family.

A perusal of the menu, while munching fresh bread and savoring a glass of wine, tempts you with its carefully planned variety. "The menu is all designed to teach cooking methods," says Kleinman. "It covers 80 to 85 percent of what students have been learning in class—saute, grill, braise, make vinaigrettes, cook vegetables, bake and make desserts." In a twist on "You have to know the rules to break them," Kleinman insists that students need to first learn the basics before they can go on to create their own dishes.

For our "test dinner," an amuse bouche, a crab-stuffed mushroom cap, arrives followed by an appetizer of chorizo-stuffed prawns wrapped in applewood-smoked bacon. The tableside Caesar preparation is a wonderful ritual that tastes as good as it looks. Entrees, all under $20, include grilled trout, sweet and sour spareribs, spinach lasagna, seared duck breast, flatiron steak, steak Diane prepared tableside and pesto-crusted lamb chops. We opted for a succulent trout and tender spareribs, and notice that a $10 macaroni and cheese entree makes Assignments kid-friendly for special occasions.

"Maybe the next celebrity chef to hit town will whip up a tableside bananas Foster for you."

THE GOALS

The purpose of this unique restaurant is to give students practical experience so they can hit the ground running. "The goal is to make the students comfortable, thinking on their feet, getting ready for reality," says Kleinman. He wants students to be able to read tickets, perform, and recover and learn getting valuable front-of-the-house and business experience in addition to cooking.

Five to seven students work in the Assignments kitchen at one time. Students at the School of Culinary Arts work toward an associate of applied science degree in culinary arts or a bachelor of arts degree in culinary management.

With degree in hand, the school places 99 percent of its students. While many students are placed at country clubs and resorts that prefer formal training, chefs from all over town—Panzano or Jax Fish House—have trained at Assignments as well. Or try O's Restaurant, whose recent media darling chef Ian Kleinman is not just a former student but Stephen Kleinman's son. Make a reservation, and maybe the next celebrity chef to hit town will whip up a tableside bananas Foster for you.

Kelly Kordes Anton is a writer, editor and hockey mom who wishes that her assignments involved lighting bananas on fire. For now, she celebrates any evening that doesn't involve a hockey game and a sports bar.

TRY IT @ HOME

CAESAR SALAD

2 cloves garlic
Taste kosher salt
2 anchovy fillets, chopped
1 coddled egg
½ lemon
½ Tbsp Dijon mustard
¼ cup red wine vinegar
¾ cup virgin olive oil
¼ tsp Worcestershire
Romaine lettuce heart, washed and dried
¼ cup croutons
¼ cup Parmesan cheese
Taste cracked black pepper

Grind together the garlic and salt. Add the chopped anchovies. Stir in the egg and lemon. Add the vinegar, olive oil and Worcestershire sauce, and whip briefly. Pour over lettuce and toss with croutons, Parmesan and black pepper.

CHORIZO-STUFFED PRAWNS

3 prawns, butterflied
3 Tbsp chorizo sausage
3 slices bacon, blanched
1 bunch parsley, fried
2 oz morita mayonnaise (recipe follows)
½ oz olive oil

Heat oven to 350°. Stuff the butterflied prawns with chorizo. Wrap a piece of the blanched bacon around each prawn and place in the oven. Cook until the chorizo is done. Place the fried parsley on a plate and place the prawns on top. Drizzle with the morita mayonnaise.

MORITA MAYONNAISE

1 pint mayonnaise
1 tsp morita powder
1 Tbsp lemon juice
Salt and pepper to taste

Mix ingredients and serve.

2 DINE & DASH OCTOBER 2014

OCTOBER 2014 DINE & DASH 3

InDesign offers many features for fine-tuning typography, including drop caps for leading the eye into a paragraph, Optical Margin Alignment for hanging punctuation outside the edge of a frame, precision line-spacing and character-spacing controls, and the ability to automatically balance text in columns.

Getting started

In this lesson, you'll fine-tune the typography in a restaurant review for a high-end lifestyles magazine. For the rich look of the magazine, the type is precisely spaced and formatted: It uses a baseline grid for aligning text across columns, actual fractions in the recipes, and decorative touches, such as drop caps and pull quotes.

1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.
2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced.
3. Choose File > Open, and open the 07_Start.indd file, in the Lesson07 folder, located inside the Lessons folder within the InDesignCIB folder on your hard disk. If the Missing Fonts dialog box displays, click Sync Fonts.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

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4. Choose File > Save As, rename the file **07_Type.indd**, and save it in the Lesson07 folder.
5. If you want to see what the finished document looks like, open the 07_End.indd file in the same folder. You can leave this document open to act as a guide as you work. When you're ready to resume working on the lesson document, click its tab in the upper-left corner of the document window.

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¼ cup red wine vinegar
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¼ tsp Worcestershire
Romaine lettuce heart, washed and dried
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MORITA MAYONNAISE

1 pint mayonnaise
1 tsp morita powder
1 Tbsp lemon juice
Salt and pepper to taste

Mix ingredients and serve.

2 DINE & DASH OCTOBER 2014

OCTOBER 2014 DINE & DASH 3

In this lesson, you will be working intensively with text. You can use the character formatting controls and paragraph formatting controls in the Control panel, or you can use the Character panel and Paragraph panel. Using the individual Character and Paragraph panels can be easier for formatting text because you can drag the panels to where you need them.

Note

Drag the Paragraph panel tab into the Character panel tab to create a panel group, if you prefer.

---

6. Choose Type > Character and Type > Paragraph to open the two primary text-formatting

panels. Leave these panels open until you finish this lesson.

7. Choose Type > Show Hidden Characters so you can see spaces, paragraph returns, tabs, and the like while you work on this lesson.

Adjusting vertical spacing

InDesign provides several options for customizing and adjusting the vertical spacing of text in a frame. You can:

- Set the space between lines of paragraphs using a baseline grid.
- Set the space between lines using the Leading menu in the Character panel.
- Set the space between each paragraph using the Space Before and Space After options in the Paragraph panel.
- Use the Vertical Justification and Balance Columns options in the Text Frame Options dialog box to align text within a frame.
- Control how paragraphs flow from one column to the next using the Keep Lines Together, Keep With Previous, and Keep With Next settings available in the Keep Options dialog box (choose Keep Options from the Paragraph panel menu).

In this section of the lesson, you will use the baseline grid to align text.

Using the baseline grid to align text

Once you've decided on the font size and leading for your document's body text, you may want to set up a baseline grid (also called a leading grid) for the entire document. The baseline grid represents the leading (line spacing) for your document's body text and is used to align the baseline of type in one column of text with the baseline of type in neighboring columns and pages.

Tip

You can set up a baseline grid at the text frame level, which is ideal for situations in which different stories have different leading values. Choose Object > Text Frame Options, then click the Baseline Options tab.

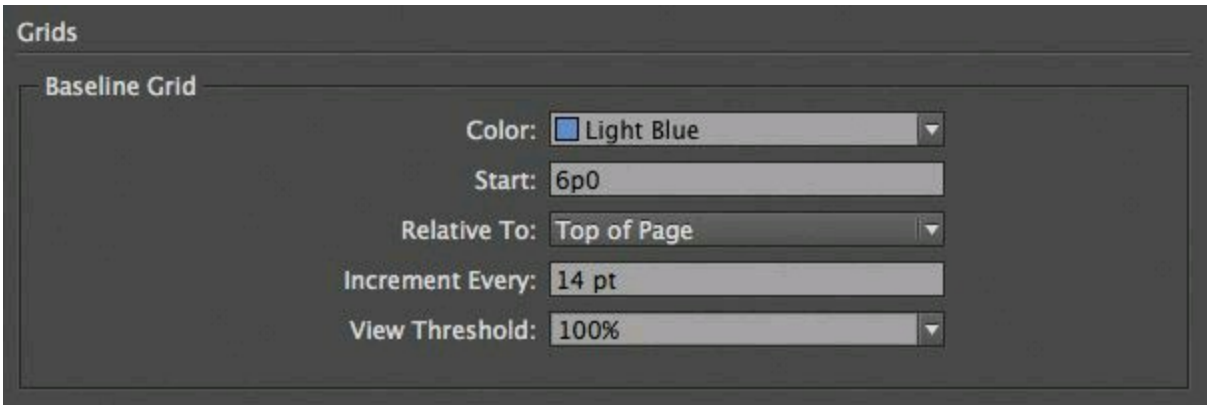
Before you set up the baseline grid, you need to check the margin value for the top of your document and the leading value for the body text. These elements work together with the grid to create a cohesive design.

1. To view the top margin value for the page, choose Layout > Margins And Columns. The top margin is set to 6p0 (6 picas, 0 points). Click Cancel.
2. To view the leading value for the body text, select the Type tool (T) in the Tools panel. Click to place an insertion point in the first full paragraph of the story, which starts with "Sure." Look at the leading value (A/A) in the Character panel. The leading is set to 14 pt (14 points).
3. Choose Edit > Preferences > Grids (Windows) or InDesign > Preferences > Grids (Mac OS) to set the baseline grid options.
4. In the Baseline Grid section, type **6p** in the Start box to match your top margin setting of 6p0.

   This option sets the location of the first grid line for the document. If you use the default value

of 3p0, the first grid line would appear above the top margin.

5. In the Increment Every box, type **14 pt** to match the leading.
6. Choose 100% from the View Threshold menu.



Tip

Customizing the View Threshold value allows you to see the baseline grid at the zoom level you use when working with text—based on your screen size, vision, and projects.

The View Threshold menu sets the minimum zoom level at which you can see the grid onscreen. When this setting is 100%, the grid appears in the document window only at magnifications of 100% or higher.

7. Click OK.
8. Choose File > Save.

Viewing the baseline grid

Now you'll make the new grid visible onscreen.

Note

If the grid does not appear, it is because the document zoom level is smaller than the grid's View Threshold value. Choose View > Actual Size to change the zoom level to 100% (the View Threshold).

---

1. To view the baseline grid in the document window, choose View > Grids & Guides > Show Baseline Grid, and then choose View > Actual Size.

Sure, you can get Caesar salad prepared tableside for two at any of the higher-end res-	welcomes intimate conversation with
taurants in town—for $25 plus another $40 (just for starters) for a single slab of steak.	friends and family.¶
Or, you can visit Assignments Restaurant, run by students of the International Culinary	A perusal of the menu, while
School at The Art Institute of Colorado, where tableside preparations include Caesar	munching fresh bread and savoring a
salad for $4.50 and steak Diane for $19. No, this isn't Elway's, but the chefs in training	glass of wine, tempts you with its care-
create a charming experience for patrons from start to finish.¶	fully planned variety. "The menu is all
Since 1992, the School of Culinary Arts has trained more than 4,300 chefs—all	designed to teach cooking methods,"
of whom were required to work in the restaurant. Those chefs are now working in	says Kleinman. "It covers 80 to 85 per-

You can align one paragraph, selected paragraphs, or all the paragraphs in a story to the baseline grid. (A story is all the text in a series of threaded text frames.) In the following steps,

you will use the Paragraph panel to align the main story to the baseline grid.

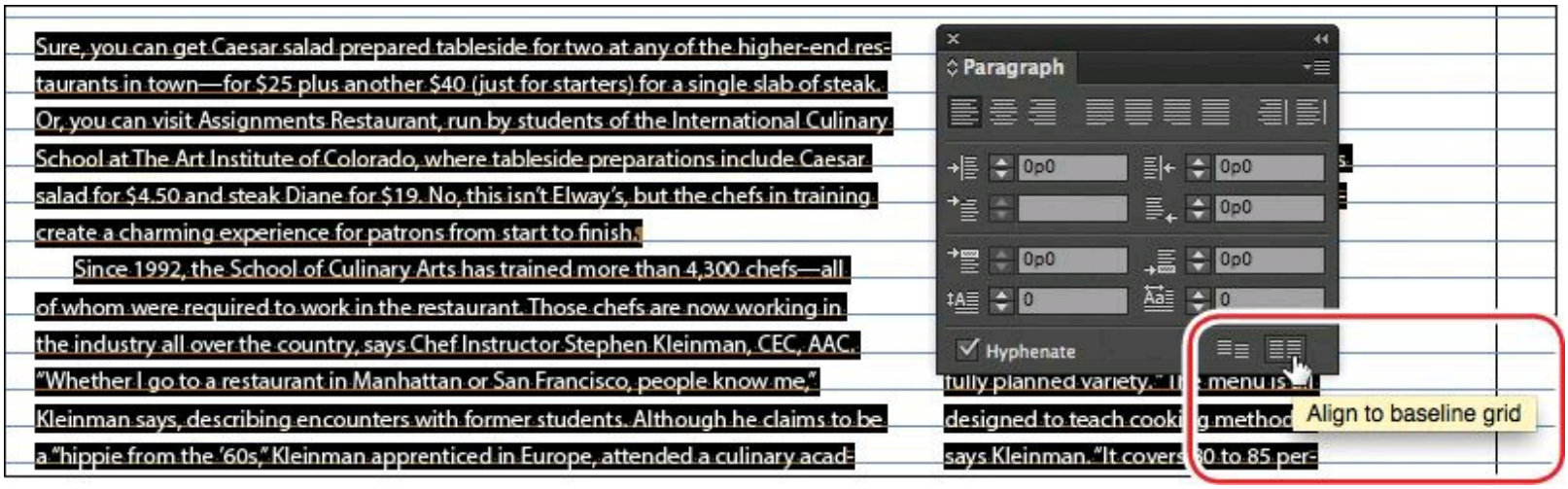
2. Using the Type tool (T), click to place an insertion point anywhere in the first paragraph on the spread, and then choose Edit > Select All to select all of the text in the main story.
3. If the Paragraph panel isn't visible, choose Type > Paragraph.

Tip

As with most other paragraph formats, the baseline grid controls are also available on the Control panel.

---

4. In the Paragraph panel, click Align To Baseline Grid (). The text shifts so that the baselines of the characters rest on the grid lines.



5. Click the pasteboard to deselect the text. Choose File > Save.

Changing the spacing between paragraphs

When you apply space before or after a paragraph that is aligned to the baseline grid, the space before/after values are ignored and the first line of the paragraph is placed on the next baseline grid line. For example, if you apply Space Before (greater than 0 and less than 14 pt) to a paragraph that's aligned to a 14-pt baseline grid, the paragraph will automatically start on the next available baseline. If you apply Space After, the following paragraph will automatically jump to the next available baseline. This creates a 14-pt space between the paragraphs.

Tip

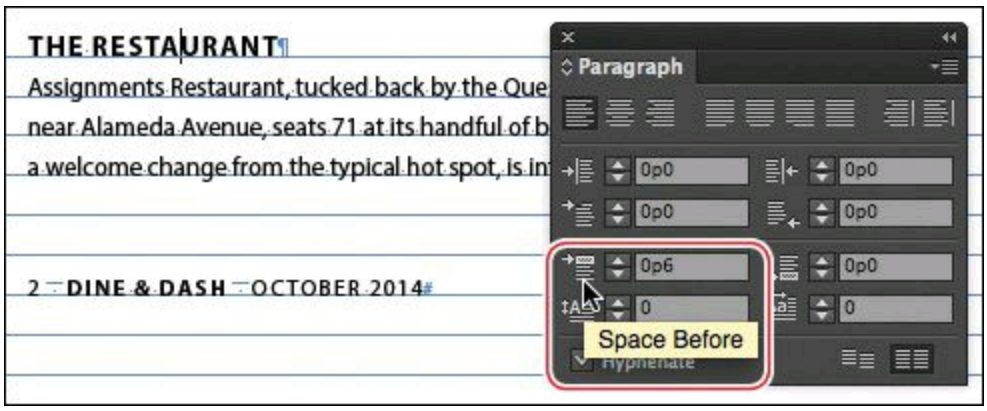
When applying paragraph attributes, it isn't necessary to select an entire paragraph with the Type tool. Just select part of the paragraph or paragraphs you want to format. If you are formatting only one paragraph, you can simply click in the paragraph to place an insertion point.

Here, you'll make the subheads in the main story stand out more by inserting space above them. Then, you'll update the Subhead paragraph style to automatically apply the new spacing to all the subheads.

1. Using the Type tool (T), click anywhere in the subhead "The Restaurant" on the left-facing page.

2. In the Paragraph panel, type **6 pt** in the Space Before box ( ), and press Enter or Return.

The points are automatically converted to picas, and the text in the subhead shifts automatically to the next grid line.



3. Choose Type > Paragraph Styles to open the Paragraph Styles panel.

4. With the insertion point still in the "The Restaurant" subhead, notice that a plus sign (+) appears after the Subhead style name in the panel.

This sign indicates that the formatting of the selected text has been modified from the original formatting of the applied paragraph style.

Tip

If you're working on a redesign of a publication, often you will experiment with already formatted text. The ability to redefine styles makes it easy to save new specifications in styles that are then saved with updated templates.

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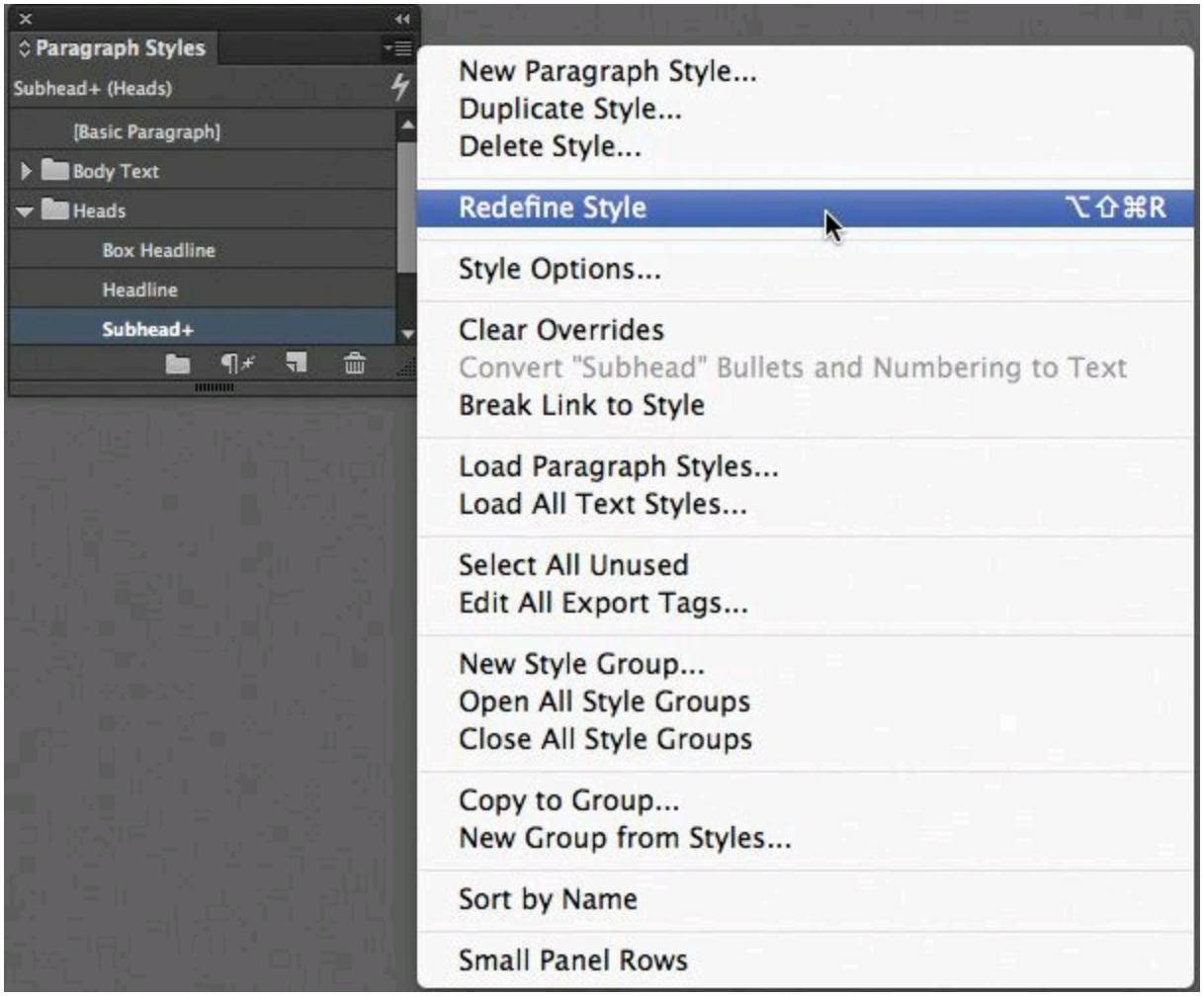
5. Choose Redefine Style from the Paragraph Styles panel menu. The Subhead style takes on the formatting—specifically, the new Space Before setting and the Align To Baseline Grid setting—of the selected paragraph.



Notice that the plus sign (+) no longer appears after the style name, and that space is added above the "The Goals" subhead on the right-facing page as well.

Tip

You can also choose Baseline Grid from the View Options menu on the Application bar to view and hide the baseline grid.

---

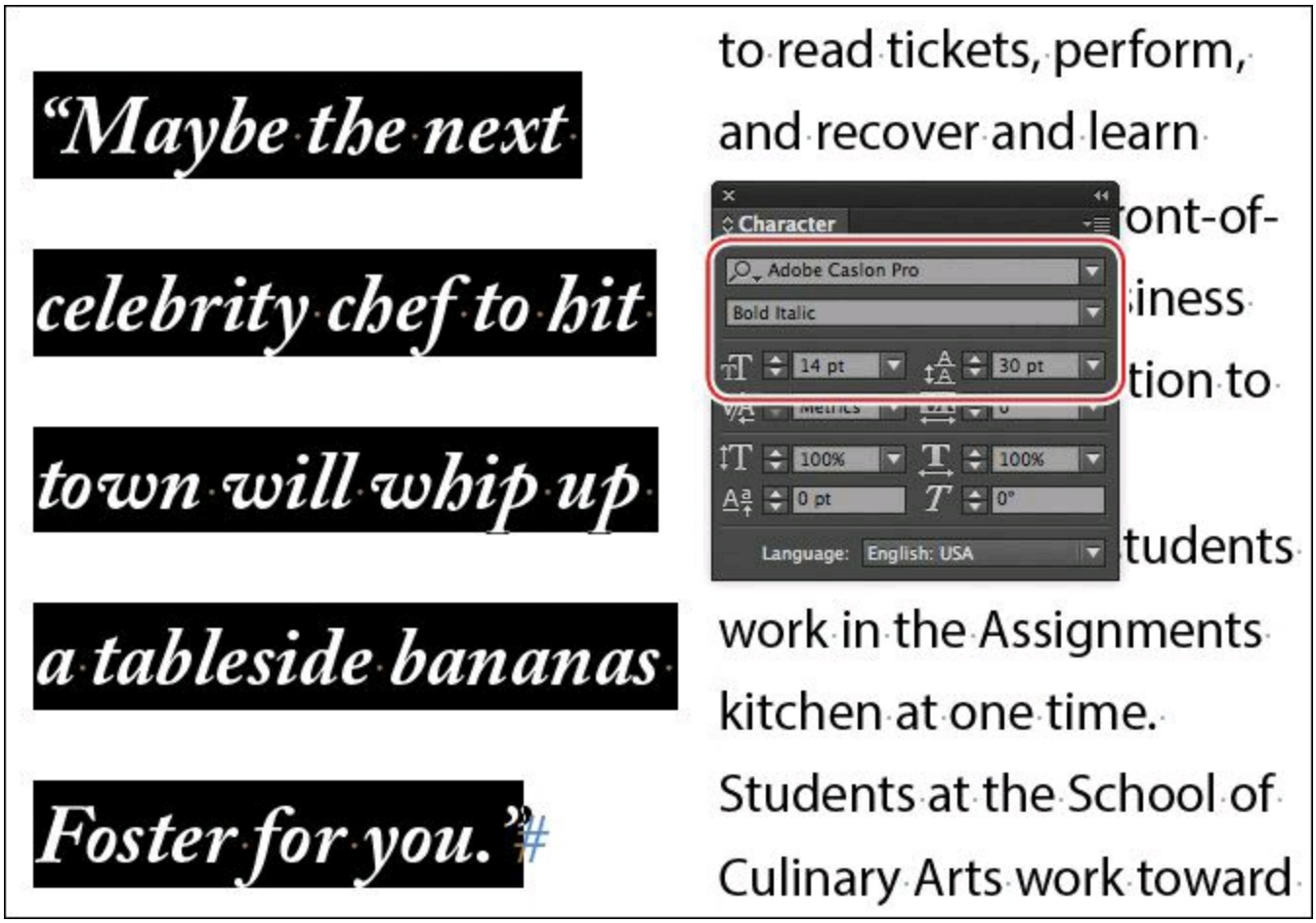
6. Choose View > Grids & Guides > Hide Baseline Grid.
7. Choose Edit > Deselect All.
8. Choose File > Save.

Changing fonts and type styles

Changing the fonts and type styles of text can make a dramatic difference in the appearance of your document. Here, you'll change the font family, type style, size, and leading for the text in the pull quote on the right-facing page. In addition, you will insert "alternate glyphs"—fancier characters—available in the OpenType font in use. You'll make these changes in the Character panel and the Glyphs panel.

1. Zoom in on the pull quote on the right-facing page.
2. If the Character panel isn't visible, choose Type > Character.
3. Using the Type tool (T), click inside the pull quote's text frame. Click four times to select the entire paragraph.

4. In the Character panel, set the following options:
   - Font: Adobe Caslon Pro (alphabetized under "C")
   - Style: Bold Italic
   - Size: 14 pt
   - Leading: 30 pt
5. Choose Edit > Deselect All.
6. Choose File > Save.



Finding fonts

For quick access to fonts you use frequently, click the star to the left of a font name in any Font menu. Then, click the Apply Favorite Filter at the top of the menu.

Another way to quickly find a font is to start typing font name in the Font field. For example, as you type "Cas" for Adobe Caslon Pro, all fonts with those three characters in it are listed. By default, InDesign searches by the entire font name. You can click the search icon to the left of the font name to search by first word only. In that case, you would need to type "Adobe Cas" for the same result.

Replacing a character with an alternate glyph

Because Adobe Caslon Pro is an OpenType font, which typically provides multiple glyphs for standard characters, you can select alternatives for many characters. A glyph is a specific form of a character. For example, in certain fonts, the capital letter A is available in several forms, such as swash and small cap. You use the Glyphs panel to select alternatives and locate any glyph in a font.

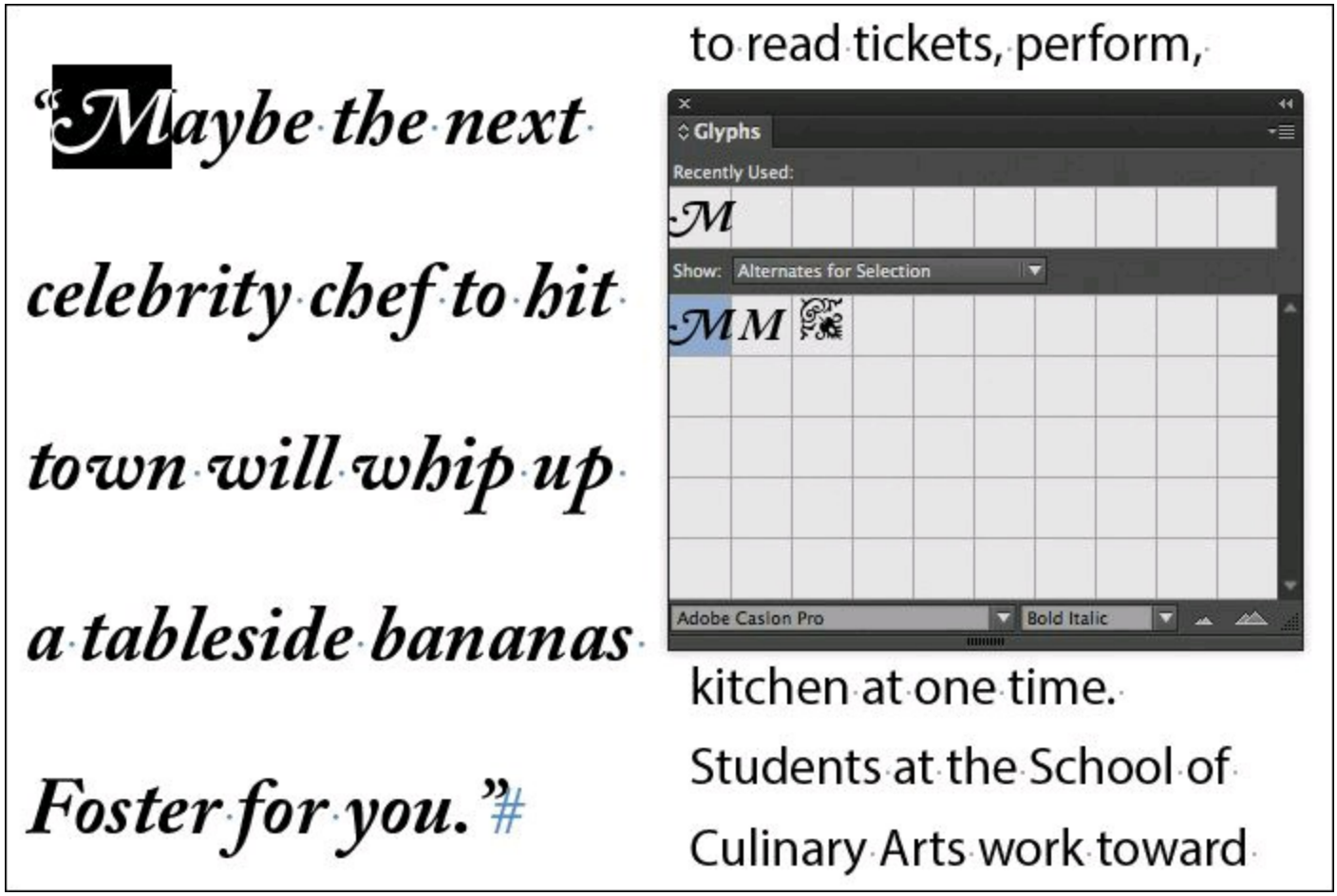
1. Using the Type tool ( ), select the first “M” in the pull quote.
2. Choose Type > Glyphs.

Tip

The Glyphs panel features many controls for filtering the options available within a font—such as Punctuation or Ornaments. Some fonts may have hundreds of alternates available, while others will have only a few.

---

3. In the Glyphs panel, choose Alternates For Selection drop-down menu from the Show menu to see the alternate glyphs available. Depending on the version of Adobe Caslon Pro that is active, your options may look different.
4. Double-click the more script-like “M” to replace the original character.



Another way to substitute available glyphs is to apply an OpenType style. Here, you will apply the Swash style, which will replace the “F” in “Foster” with a swash character (any other relevant glyphs will be substituted as well).

5. Using the Type tool, drag to select all the text in the frame.

Note

In the OpenType menu, options that display in brackets are not available for the selected font.

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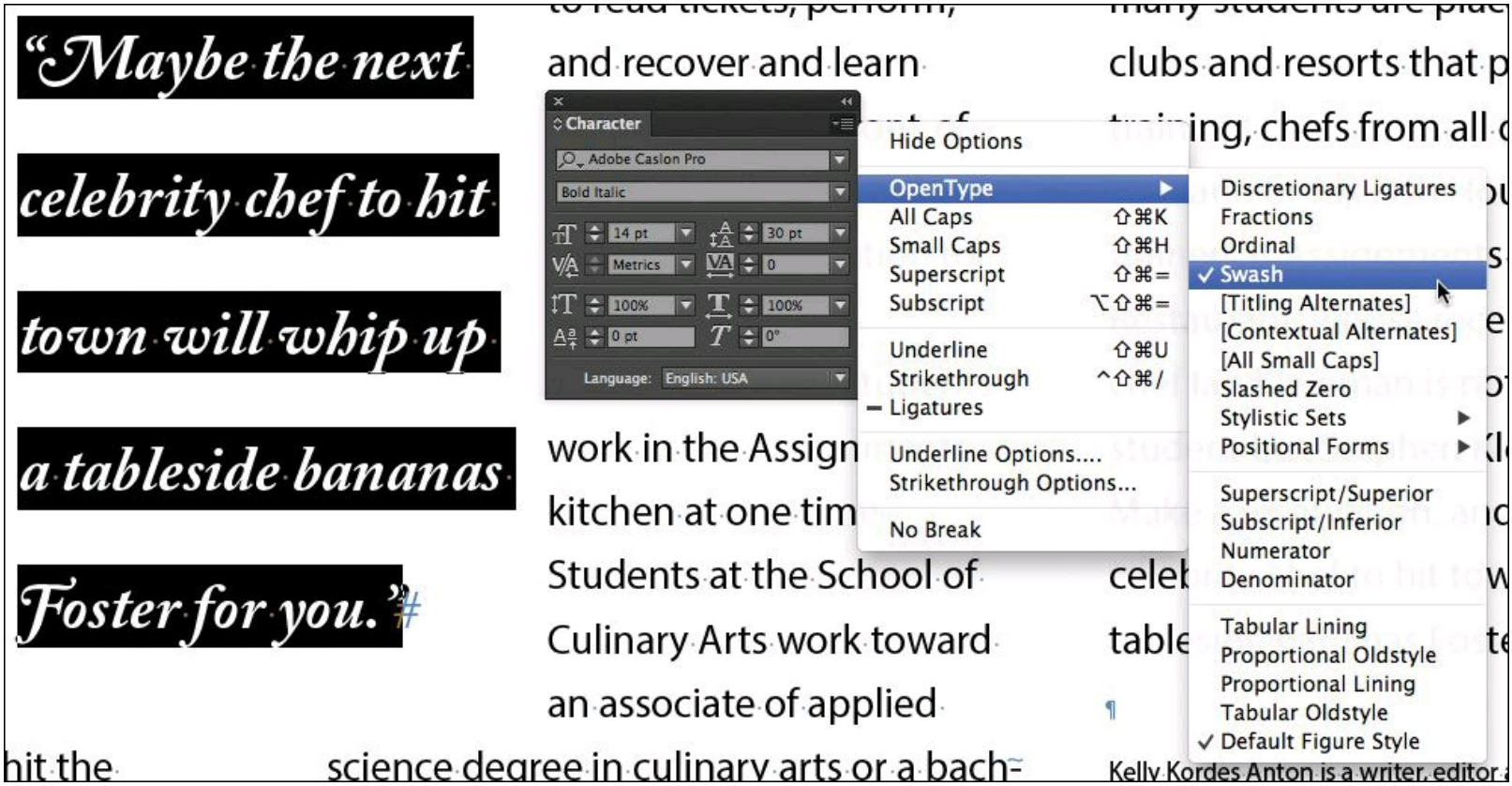
6. In the Character panel, click the panel menu, and then choose OpenType > Swash.



7. Choose Edit > Deselect All.
8. Choose File > Save.

Adding a special character

Now you’ll add a decorative font character and a right-indent tab to the end of the story—also known as an “end-of-story character.” This lets the reader know that the story is finished.

Tip

You can access some of the more commonly used glyphs, such as the copyright and trademark symbols, in the Type menu (Insert > Special Character > Symbols) and the context menu. To access the context menu, right-click (Windows) or Control-click (Mac OS) at the insertion point.

---

1. Scroll or zoom to see the last body paragraph of the story, ending with the words “bananas Foster for you.”
2. Using the Type tool (T), click to place an insertion point in the last paragraph, just after the final period.
3. If the Glyphs panel is not open, choose Type > Glyphs.

   You can use the Glyphs panel to view and insert OpenType attributes, such as ornaments, swashes, fractions, and ligatures.
4. At the bottom of the panel, type the first few letters of “Adobe Caslon Pro” until the font is recognized and selected.
5. In the Glyphs panel, choose Ornaments from the Show menu.
6. From the scrollable list, select any decorative character you prefer and double-click to insert

it. The character appears at the insertion point in the document.

7. Using the Type tool, click to place an insertion point between the final period and the decorative character.

Tip

To quickly insert a right-indent tab, press Shift+Tab.

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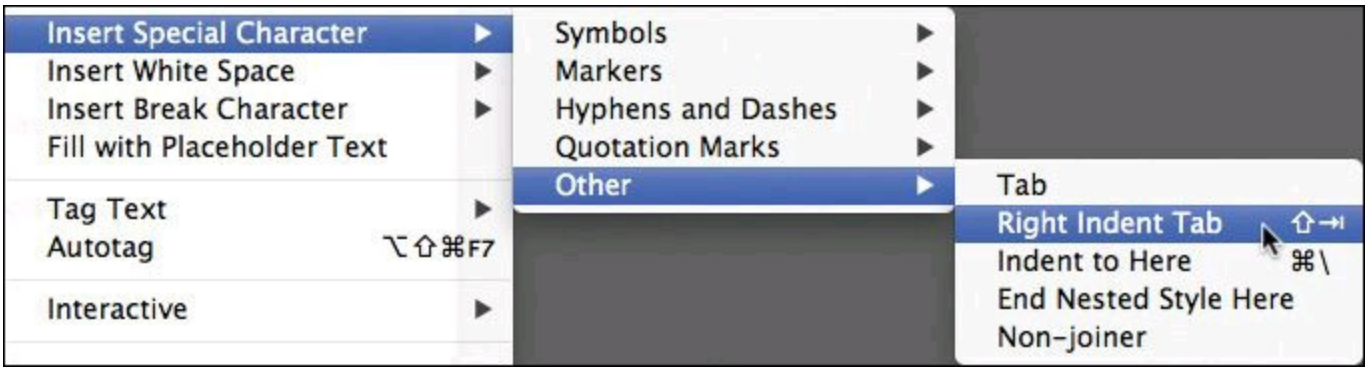
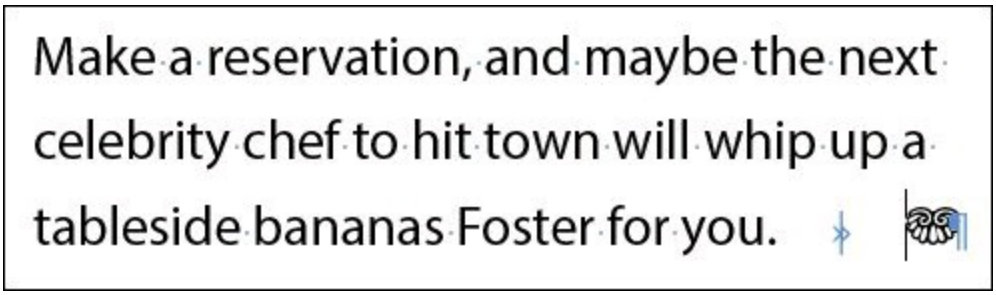
8. Right-click (Windows) or Control-click (Mac OS) to display the context menu, and choose Insert Special Character > Other > Right Indent Tab.





9. Choose File > Save.

OpenType fonts

OpenType fonts, such as Adobe Caslon Pro, may display many more glyphs than you are accustomed to seeing. OpenType fonts can contain many more characters and glyph alternates than other fonts. For more information on OpenType fonts, visit www.Adobe.com/type.

Inserting fraction characters

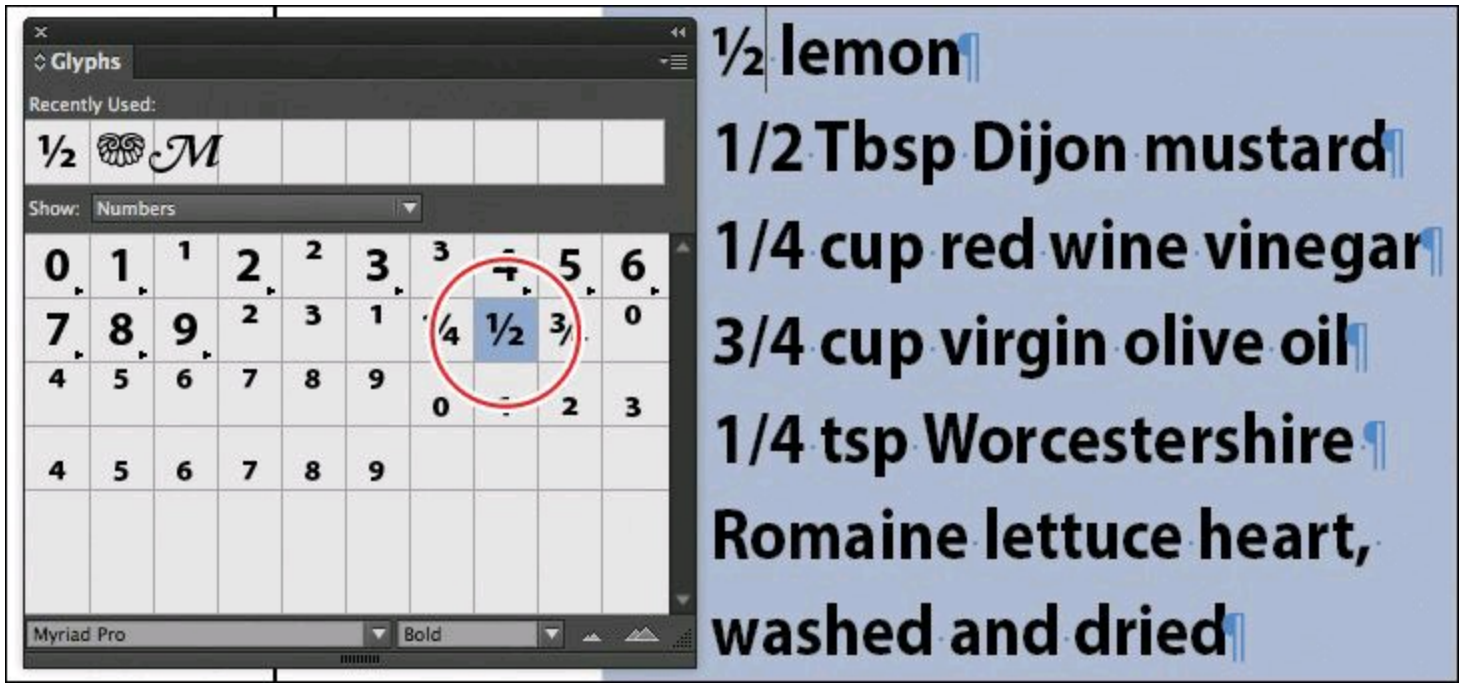
The recipes in this article do not use actual fraction characters—rather, the 1/2 is built with a numeral 1, a slash, and a numeral 2. Most fonts contain individual characters for common fractions such as ½, ¼, and ¾. When available, these elegant fractions look much more professional than using numerals and slashes.

Tip

If you are working on a cookbook or other document that requires a variety of fractions, the fractions built into most fonts will not cover all the values you need. You will need to research numerator and denominator formatting options, which are available in some OpenType fonts, or purchase a specific fraction font.

---

1. Scroll to the recipes at the bottom of the right-facing page.
2. Using the Type tool (T), select the first instance of 1/2 ("1/2 lemon" in the Caesar Salad recipe).
3. If the Glyphs panel is not open, choose Type > Glyphs.
4. Choose Numbers from the Show menu.
5. Resize the panel so you can see more characters. Scroll as necessary to locate the ½ fraction.
6. Double-click the ½ fraction to replace the selected 1/2 in the text.



Notice that the ½ fraction is stored in the Recently Used boxes at the top of the Glyphs panel. Now you'll change instances of the 1/4 and 3/4 fractions.

7. In the Caesar Salad recipe, locate and select 1/4 ("1/4 cup red wine vinegar").
8. In the Glyphs panel, locate and double-click the ¼ fraction.
9. Repeat steps 6 and 7, locating and selecting 3/4 ("3/4 cup virgin olive oil"), and replacing it with the ¾ fraction in the Glyphs panel.
10. If you wish, replace the remaining instances of 1/2 and 1/4 in the recipes by selecting the text and double-clicking the respective glyphs in the Recently Used boxes.

11. Close the Glyphs panel, and choose Edit > Deselect All.
12. Choose File > Save.

Fine-tuning columns

In addition to adjusting the number of columns in a text frame, the width of the columns, and the space between them, you can create a headline that spans columns (also known as a "straddle head") and automatically balance the amount of text in the columns.

Creating a straddle head

The headline for the sidebar box needs to span the three columns. You can do this with a paragraph format rather than by placing the headline in its own text frame.

1. Using the Type tool (T), click in the "TRY IT @ HOME" headline.
2. If the Paragraph panel is not open, choose Type > Paragraph.
3. Choose Span Columns from the Paragraph panel menu.

Tip

You can also choose Span Columns from the Control panel menu when the Type tool is selected.

---

4. Choose Span Columns from the Paragraph Layout menu in the Span Columns dialog box.

5. Click Preview, then choose different options from the Span menu to see how the headline looks. Then, choose All from the Span menu and click OK.

6. With the insertion point still in the "TRY IT @ HOME" subhead, choose Redefine Style from the Paragraph Styles panel menu. The style is updated to reflect the Span Columns setting.
7. Choose File > Save.

Balancing columns

Now that the headline is added, you can complete the fine-tuning of the sidebar by balancing the amount of text in each column. You can do this manually, by inserting a column break character (Type > Insert Break Character > Column Break). The break characters, however, remain if the text reflows, often forcing text into the wrong column. Instead, you will balance the columns automatically.

1. Choose View > Fit Page In Window to center the second page in the document window.
2. Using the Selection tool (), click to select the text frame containing the recipes.

Tip

You can also select Balance Columns in the Text Frame Options dialog box (Object menu).

---

3. Click Balance Columns () in the Control panel. (The columns controls are on the right side of the Control panel.)

   Note that any Keep With Next and Keep Lines Together settings for the paragraphs are honored

when balancing columns.

4. Choose File > Save.

TRY IT @ HOME

CAESAR SALAD

2 cloves garlic
Taste kosher salt
2 anchovy fillets, chopped
1 coddled egg
½ lemon
½ Tbsp Dijon mustard
¼ cup red wine vinegar
¾ cup virgin olive oil
¼ tsp Worcestershire
Romaine lettuce heart, washed and dried
¼ cup croutons
¼ cup Parmesan cheese
Taste cracked black pepper

Grind together the garlic and salt. Add the chopped anchovies. Stir in the egg and lemon. Add the vinegar, olive oil and Worcestershire sauce, and whip briefly. Pour over lettuce and toss with croutons, Parmesan and black pepper.

CHORIZO-STUFFED PRAWNS

3 prawns, butterflied
3 Tbsp chorizo sausage
3 slices bacon, blanched
1 bunch parsley, fried
2 oz morita mayonnaise (recipe follows)
½ oz olive oil

Heat oven to 350°. Stuff the butterflied prawns with chorizo. Wrap a piece of the blanched bacon around each prawn and place in the oven. Cook until the chorizo is done. Place the fried parsley on a plate and place the prawns on top. Drizzle with the morita mayonnaise.

MORITA MAYONNAISE

1 pint mayonnaise
1 tsp morita powder
1 Tbsp lemon juice
Salt and pepper to taste

Mix ingredients and serve.

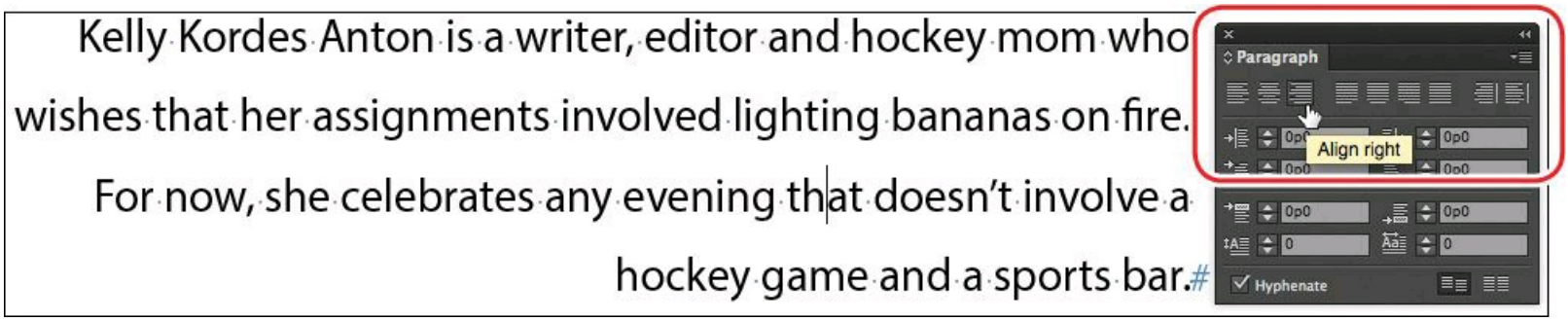
Balanced Columns is set for the sidebar box's text frame. The paragraphs flow according to the Keep With Next and Keep Lines Together paragraph formats.

Changing paragraph alignment

You can easily manipulate how a paragraph fits within its text frame by changing the horizontal alignment. You can align text with one or both edges of a text frame, or you can apply inset spacing. Justifying text aligns both the left and right edges. In this exercise, you'll align the author's biographical information—otherwise known as the "bio"—with the right margin.

1. Scroll and zoom as necessary to view the author's bio under the last paragraph of the story.
2. Using the Type tool (T), click to place an insertion point in the bio text.

   Because the text in the bio is so small, the line spacing from the baseline grid looks too big. In addition, the spacing is causing overset text (text that doesn't fit in the frame). To fix this, you will unlock this paragraph from the grid.
3. With the insertion point still in the bio paragraph, in the Paragraph panel, click Do Not Align To Baseline Grid ( ).
4. In the Paragraph panel, click Align Right ( ).



5. Choose Edit > Deselect All.
6. Choose File > Save.

Hanging punctuation outside the margin

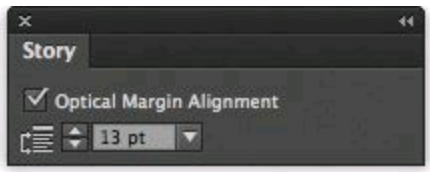
Sometimes, particularly with punctuation at the beginning and end of lines, margins that are in fact even may appear uneven. To fix this visual discrepancy, designers use optical margin alignment to "hang" punctuation and swashes on characters slightly outside the text frame.

Note

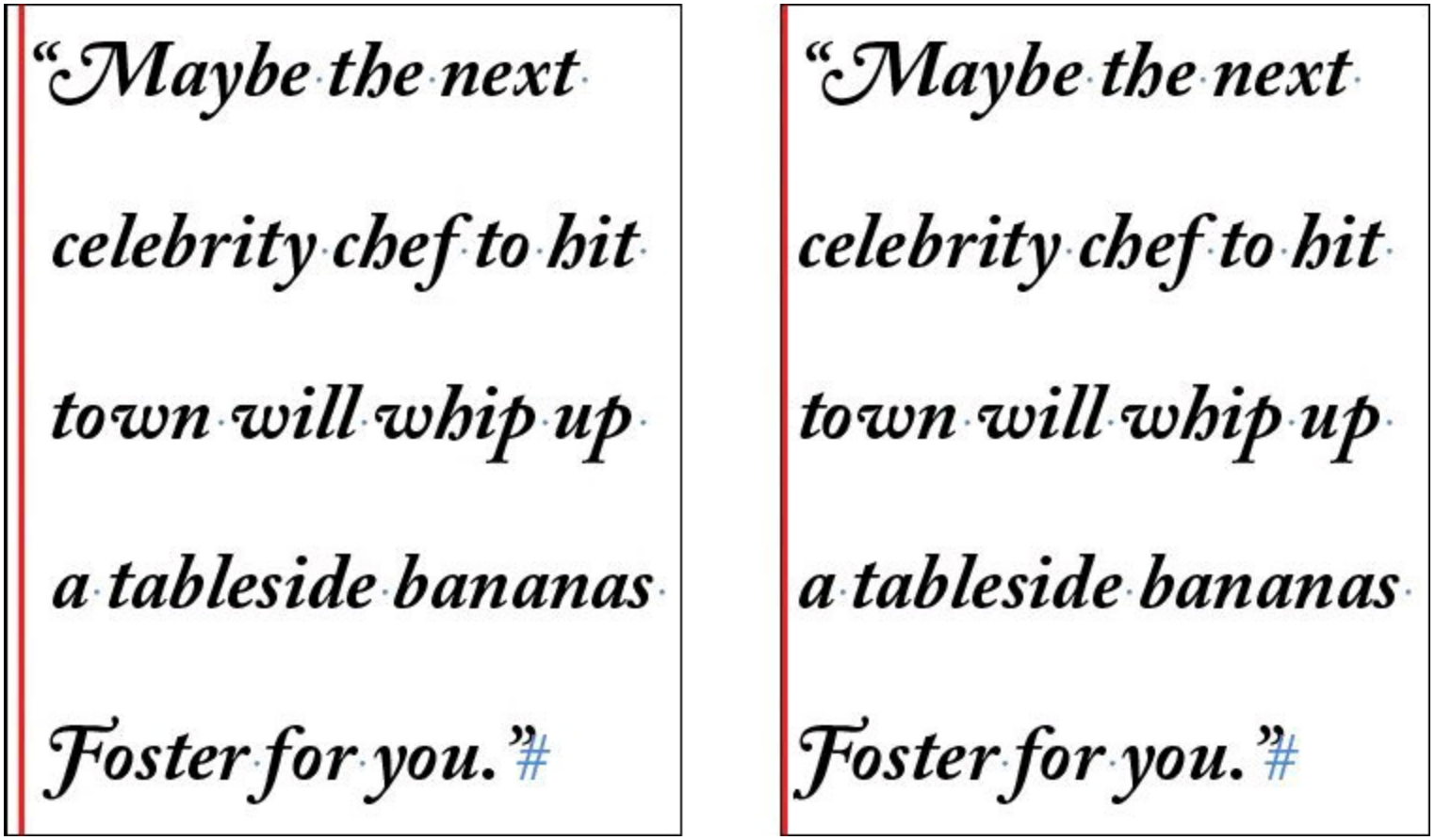
When you select Optical Margin Alignment, it applies to all of the text in a story—defined as all the text in a frame or a series of threaded text frames—hence the use of the Story panel.

In this exercise, you will apply optical margin alignment to the pull quote.

1. Scroll and zoom as necessary to view the pull quote on the right-facing page.
2. Using the Selection tool ( ), click to select the text frame containing the pull quote.
3. Choose Type > Story to open the Story panel.
4. Select Optical Margin Alignment.
5. Change the Align Based On Size value to 13 pt, and then close the Story panel.



When using Optical Margin Alignment, specifying an Align Based On Size that matches the point size of the text in the frame produces the best results.



Without (left) and with (right) optical margin alignment. Notice the alignment of the quotation marks. The text looks more visually aligned.

6. Choose Edit > Deselect All.
7. Choose File > Save.

Creating a drop cap

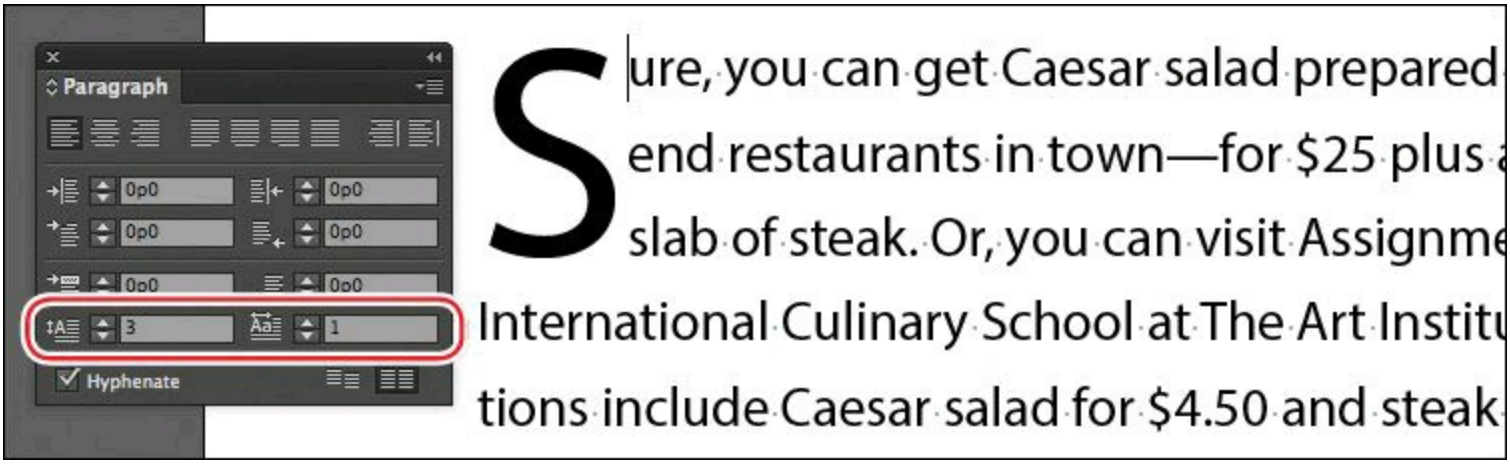
You can add creative touches to your document using the special InDesign font features. For example, you can make the first character or word in a paragraph a drop cap, apply a gradient or color fill to text, or create superscript and subscript characters, along with ligatures and old-style numerals. Here, you'll create a drop cap out of the first character in the first paragraph of the story.

Tip

Drop caps can be saved with paragraph styles so you can apply them quickly and consistently.

---

1. Scroll to view the first paragraph in the left-facing page. Using the Type tool (T), click to place an insertion point anywhere in that paragraph.
2. In the Paragraph panel, type **3** in the Drop Cap Number Of Lines box (A) to make the letter drop down three lines.
3. Type **1** in the Drop Cap One Or More Characters box (Aa) to enlarge the “S” in “Sure.” Press Enter or Return.



4. Using the Type tool, select the drop-cap character.

   Now, you can apply any character formatting you wish.

5. Choose Type > Character Styles to open the Character Styles panel.

6. Click the Drop Cap style to apply it to the selected text.

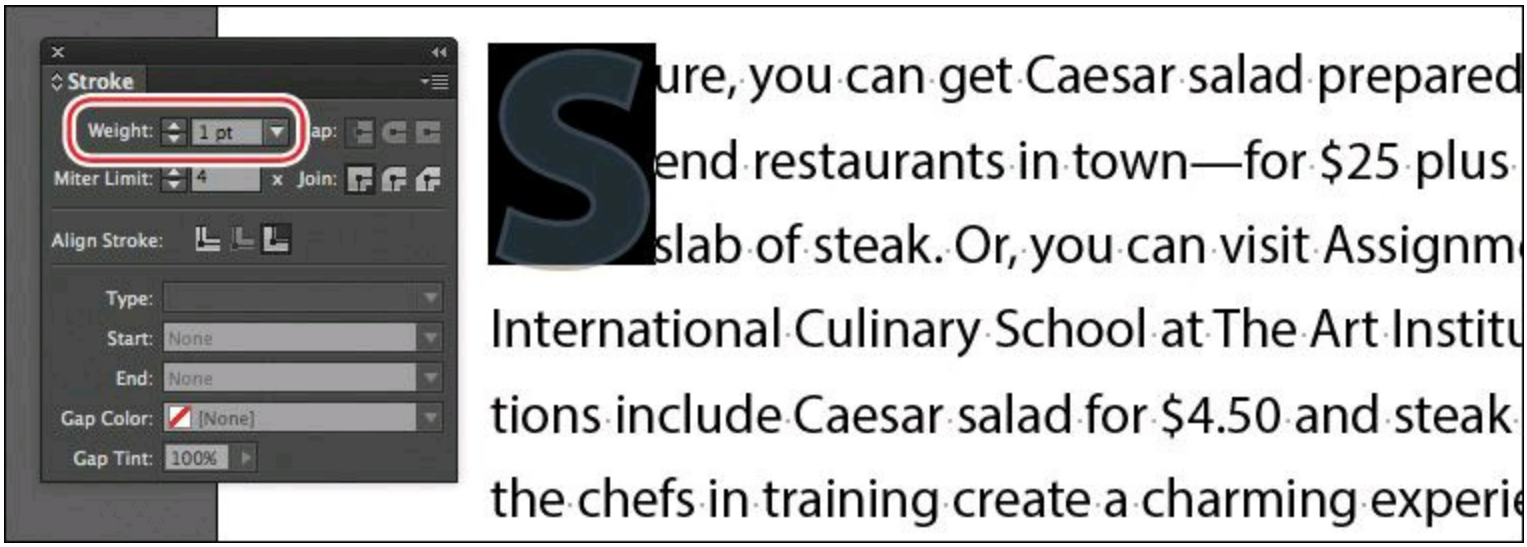
7. Click to deselect the text and look at the drop cap. Choose File > Save.

Applying a stroke to text

Next, you'll add a stroke to the drop-cap character you just created.

1. With the Type tool ( ) still selected, select the drop-cap character.

2. Choose Window > Stroke. In the Stroke panel, type **1 pt** in the Weight box, and press Enter or Return.



A stroke appears around the selected character. Now you'll change the color of the stroke.

3. Choose Window > Color > Swatches. In the Swatches panel, select the Stroke box ( ), and then click [Black].
4. Press Shift+Ctrl+A (Windows) or Shift+Command+A (Mac OS) to deselect the text so that you can view the stroke effect.
5. Choose File > Save.

Adjusting the drop cap alignment

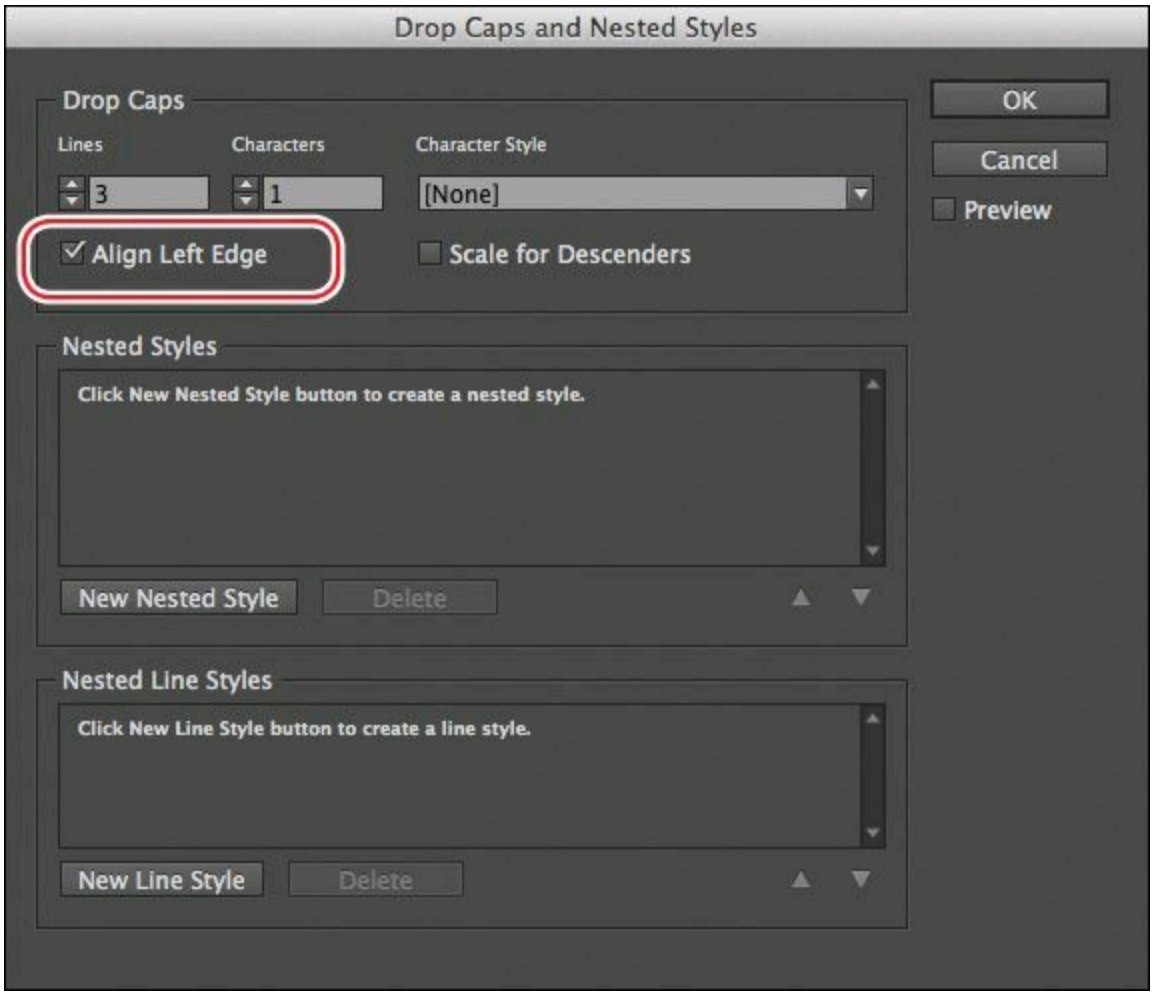
You can adjust the alignment of drop-cap characters as well as scale the size of the drop cap if it has a descender, as does "y." In this section, you'll adjust the drop cap so that it aligns better with the left margin.

Tip

Selecting Align Left Edge is particularly helpful for better typographical positioning of a sans serif drop cap.

---

1. Using the Type tool ( ), click to place an insertion point anywhere in the first paragraph with the drop cap.
2. Choose Type > Paragraph. In the Paragraph panel, choose Drop Caps And Nested Styles from the panel menu.
3. Select Align Left Edge to move the drop cap so that it aligns better to the left edge of the text.



4. Click OK.
5. Choose File > Save.

Adjusting letter and word spacing

You can change the spacing between letters and words using kerning and tracking. You can also control the overall spacing of text in a paragraph by using the Adobe Single-line Composer and the Adobe Paragraph Composer.

Adjusting the kerning and tracking

By adjusting kerning, you can add or subtract space between specific letter pairs. Tracking creates an equal amount of spacing across a range of letters. You can use both kerning and tracking on the same text.

Here, you'll manually kern the space between the drop cap "S" and the remainder of the word, "ure." Then you'll track the heading "If You Go" in the blue box.

1. To see the results of the kerning more clearly, select the Zoom tool ( ) in the Tools panel and drag a marquee around the drop cap.
2. Using the Type tool ( ), click to place an insertion point between the "S" drop cap and the "u" after it.

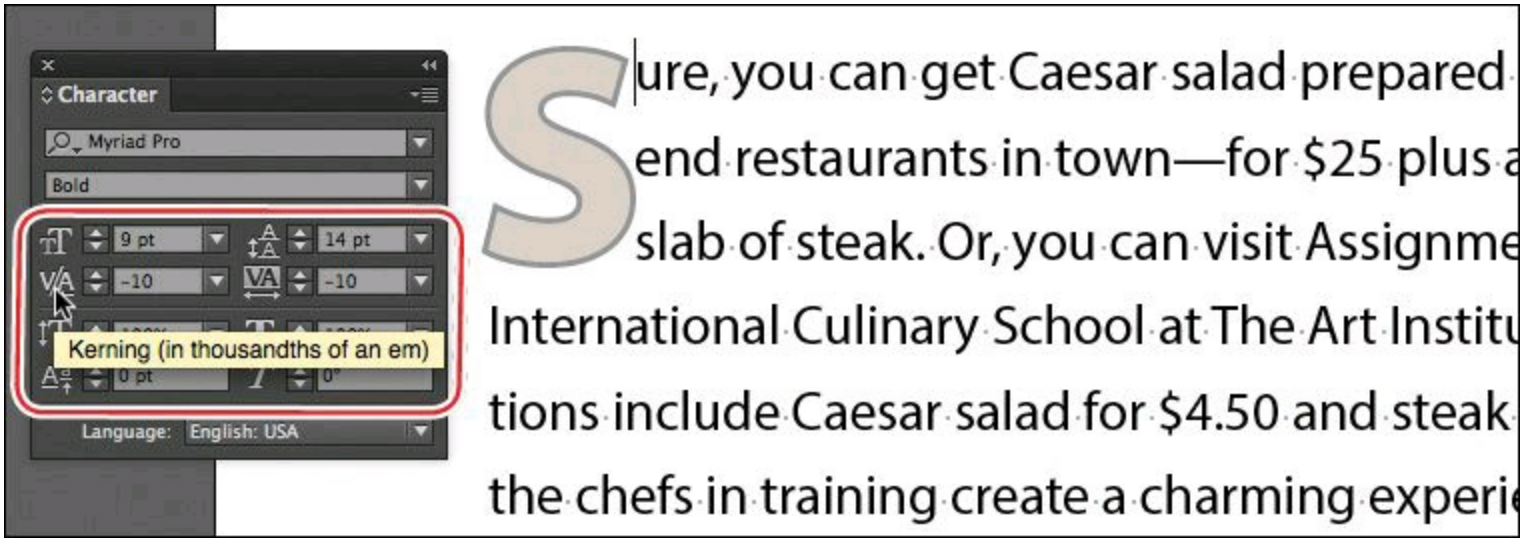
Tip

When you kern text, the Right Arrow key adds space and the Left Arrow key removes space when combined with the Alt (Windows) or Option (Mac OS) key. To change the amount of kerning applied using the shortcuts, you can edit the Keyboard Increments value in Preferences (Units & Increments).

---

3. Press Alt+Left Arrow (Windows) or Option+Left Arrow (Mac OS) to decrease the amount that the letter "u" moves to the left. Continue to press this key combination until the spacing between the two adjacent letters looks visually pleasing to you.

   The example shows the text kerned –10. You can see the new kerning values in the Control panel as well.



Now you'll set a tracking value for the entire "If You Go" heading to increase the overall

spacing between the letters. To set tracking, you must first select the entire range of characters you want to track.

4. Choose Edit > Deselect All. Scroll down to view the "If You Go" heading in the blue box below the word "Sure."

Note

If you have trouble selecting the text, first use the Selection tool to select the blue text frame.

---

5. Using the Type tool, click three times on "If You Go" to select the entire heading.
6. In the Character panel, choose 50 from the Tracking menu (VA).

7. Click on the pasteboard to deselect the text.
8. Choose View > Fit Spread In Window to see your latest changes.
9. Choose File > Save.

Adjusting line breaks

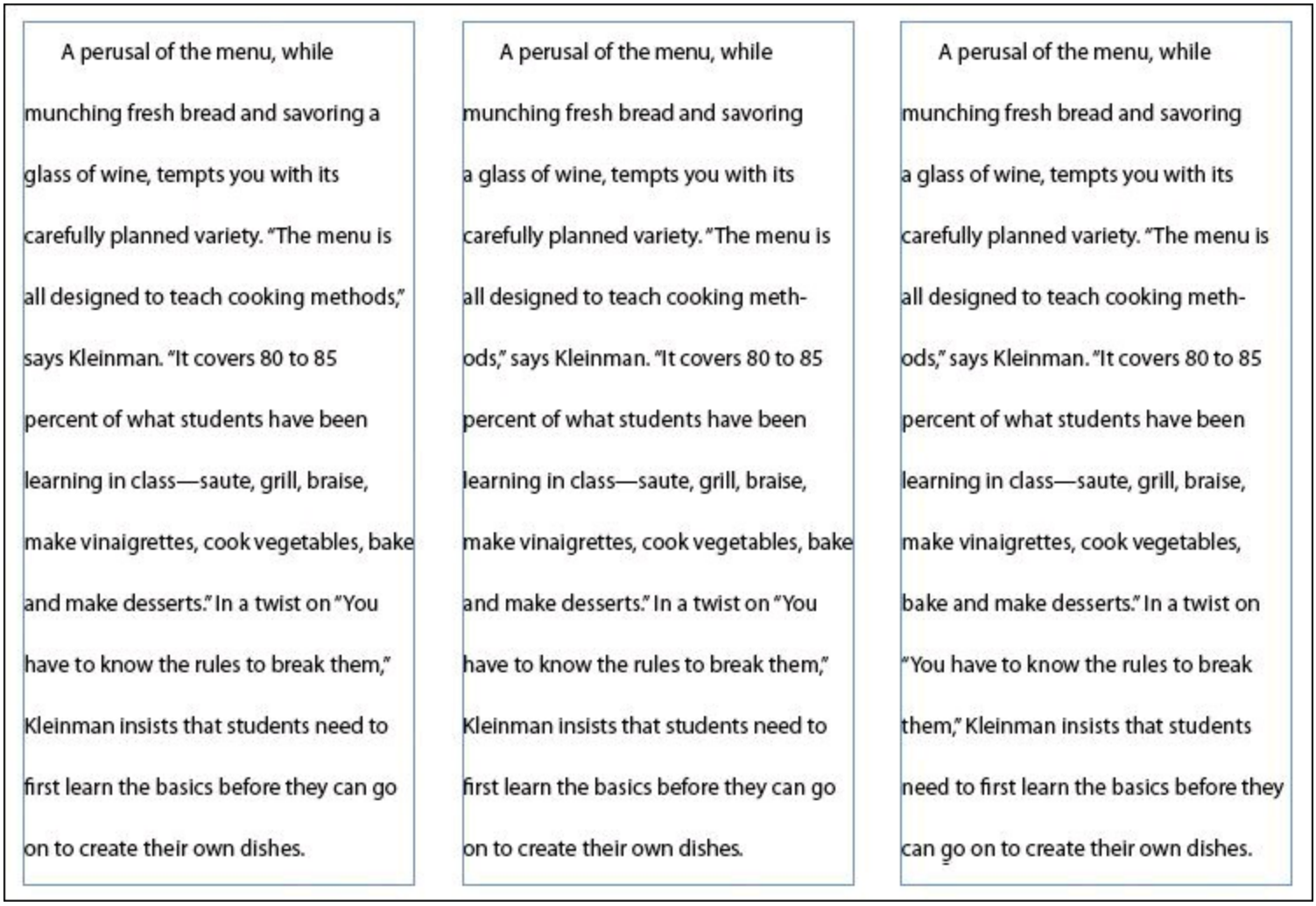
When text is not justified, the breaks at the end of each line affect the readability and impact. For example, when paragraphs are aligned to the left, the right edge remains ragged. Too much "rag" can make the text easier or harder to read based on many factors, including the font, size, leading, column width, and more. Three other paragraph formats affect the readability of the text:

Tip

For justified text, Justification settings combine with the Paragraph Composer and hyphenation settings to control how dense paragraphs look. To adjust these settings for a selected paragraph, choose Justification from the Paragraph panel menu.

- Paragraph Composer, which automatically determines line breaks
- Hyphenation settings, such as whether to hyphenate capitalized words
- Balance Ragged Lines feature

Typically, a graphic designer will experiment with a combination of settings until a few paragraphs of sample text look just right. Then, all these options can be saved in paragraph styles and applied with one click. The body paragraph styles used in the lesson document specify the Adobe Paragraph Composer and fine-tuned hyphenation settings, so you will only compare the Composers and then apply the Balanced Ragged Lines feature.



Note the difference in line breaks with successive application of line break methods. The first column shows a paragraph with custom hyphenation settings (such as preventing the hyphenation of capitalized words) and the Adobe Single-line Composer. The middle column shows the same paragraph with the Adobe Paragraph Composer applied. As you can see, the right edge is much less ragged. The column on the right shows the paragraph with both Adobe Paragraph Composer and Balance Ragged Lines applied.

Applying the Adobe Paragraph and Single-line Composers

The density of a paragraph (sometimes called its color) is determined by the composition method used. InDesign's composition methods consider the word spacing, letter spacing, glyph scaling, and hyphenation options you've selected and then evaluate and choose the best line breaks. InDesign provides two options for composing text: the Adobe Paragraph Composer, which looks at all of the lines in the paragraph, and the Adobe Single-line Composer, which looks separately at each

individual line.

Note

The Adobe World-Ready Single-line Composer and the Adobe World-Ready Paragraph Composer are intended for use with non-Western languages, such as Hindi.

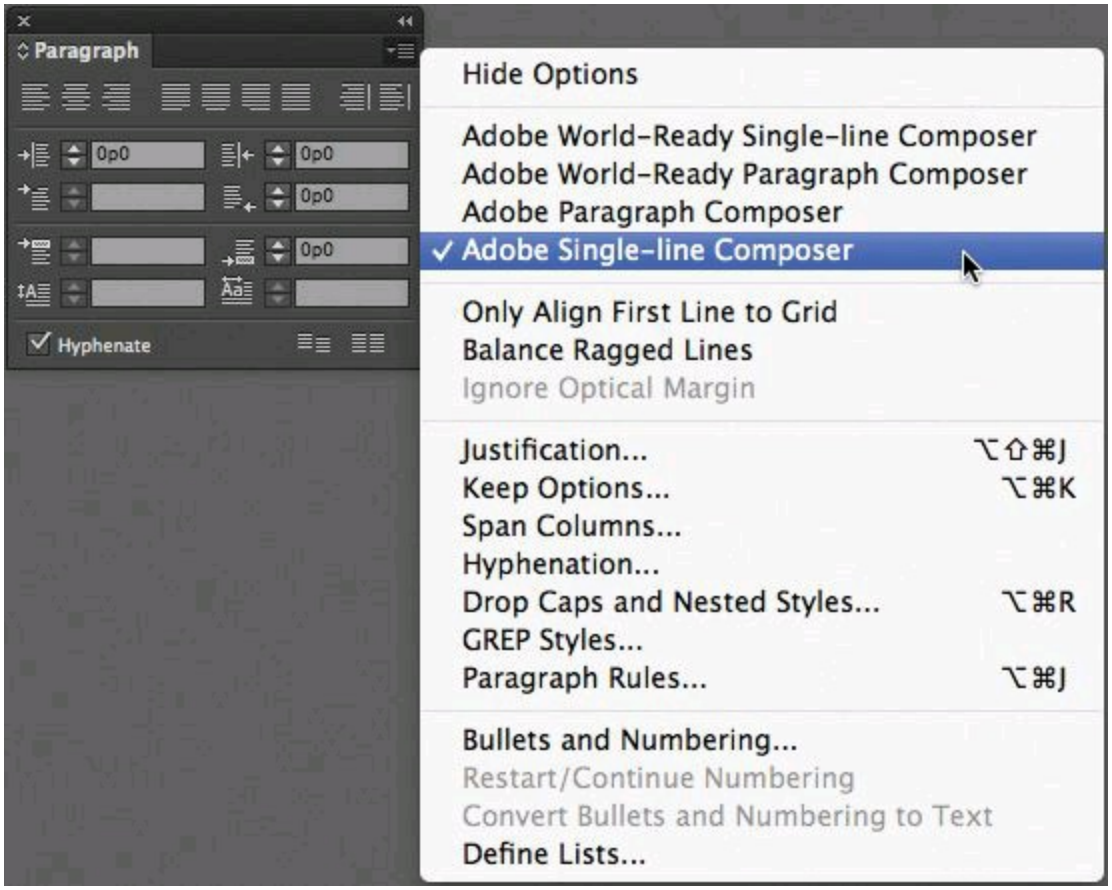
When you use the Paragraph Composer, InDesign composes a line while considering the impact on the other lines in the paragraph, to set the best overall arrangement of the paragraph. As you change type in a given line, previous and subsequent lines in the same paragraph may break differently, making the overall paragraph appear more evenly spaced. When you use the Single-line Composer, which is the standard for other layout and word-processing software, InDesign recomposes only the lines following the edited text.

Tip

As a last resort, you can adjust line breaks manually by inserting the Forced Line Break (Shift+Return) character or a Discretionary Line Break character at the end of a line. Both characters are available in the Type > Insert Break Character submenu. Because the line break characters remain as text reflows, it's best to add them when the text and formatting are final.

The text in this lesson was composed using the default, the Adobe Paragraph Composer. To see the difference between the two, you'll recompose the body text using the Adobe Single-line Composer.

1. Using the Type tool (T), click to place an insertion point anywhere in the main story.
2. Choose Edit > Select All.
3. In the Paragraph panel, choose Adobe Single-line Composer from the panel menu. If necessary, increase the view scale to see the difference.

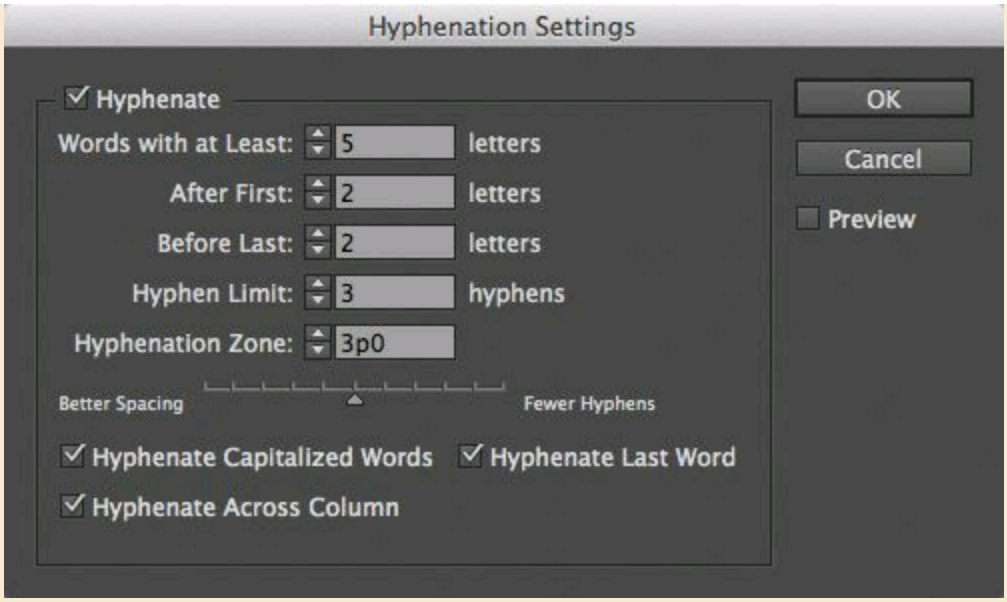


The Single-line Composer handles each line individually. As a result, some lines in a paragraph appear denser or more sparse than others. Because the Paragraph Composer looks at multiple lines at once, it makes the density of the lines in a paragraph more consistent.

4. Click a blank area of the page to deselect the text, and look at the different spacing and line endings.
5. To restore the story to the Adobe Paragraph Composer, choose Edit > Undo.
6. Choose Edit > Deselect All.

Hyphenation settings

Whether and how words are hyphenated at the ends of lines is a paragraph format. To customize hyphenation for selected paragraphs, choose Hyphenation from the Paragraph panel menu. You can also adjust hyphenation settings in the Paragraph Style Options dialog box. In general, the hyphenation settings are editorial decisions, not design decisions. A publication's style guide, for example, may specify that capitalized words should not be hyphenated.



When you're editing text, you can use the Hyphenate check box on the Control panel to quickly enable and disable hyphenation for selected paragraphs. In addition, you may have specific words, such as trademarked words, that you prefer not to hyphenate or to hyphenate at specific points. You can specify the preferred hyphenation in Edit > Spelling > User Dictionary.

Balancing ragged lines

When paragraphs are not justified, the line endings can sometimes look too ragged, with some lines much longer or shorter than others. Using the Adobe Paragraph Composer and adjusting hyphenation can help, as can the Balance Ragged Lines feature. You will apply that here.

Tip

The Balance Ragged Lines feature also works well on balancing multi-line headlines.

1. Using the Type tool ( ), click to place an insertion point anywhere in the main story.
2. Choose Edit > Select All.
3. In the Paragraph panel, choose Balance Ragged Lines from the panel menu.
4. Choose Edit > Deselect All.
5. Choose File > Save.

Setting tabs

You can use tabs to position text in specific horizontal locations in a column or frame. In the Tabs panel, you can organize text and create tab leaders, indents, and hanging indents.

Aligning text to tabs and adding tab leaders

Here, you'll format the tabbed information in the "If You Go" box on the left-facing page. The tab markers have already been entered in the text, so you will be setting the final location of the text.

Tip

When working with tabs, it helps to view the tab characters by choosing Type > Show

Hidden Characters. It is very common to receive word-processing files in which the writer or editor has entered multiple tabs to align the text onscreen—or worse, entered spaces rather than tabs. The only way to see what you're dealing with (and fix it) is to view hidden characters.

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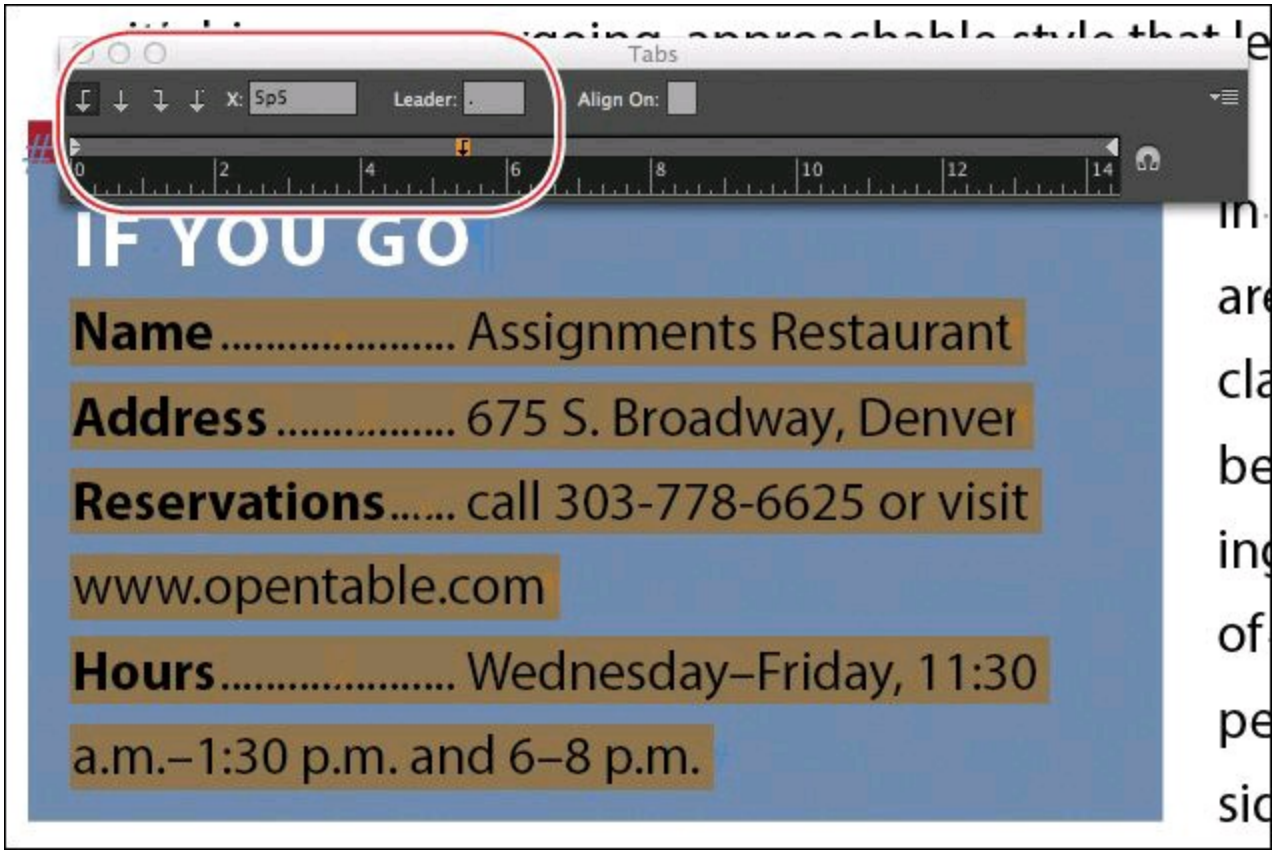
1. Scroll and zoom as necessary to view the "If You Go" box.
2. To view the tab markers in the text, make sure that hidden characters are showing (Type > Show Hidden Characters) and that Normal Mode ( ) is selected in the Tools panel.
3. Using the Type tool ( ), click in the "If You Go" box, and select from the second line (starting with "Name") to the last line (ending with "6–8 p.m.)."
4. Choose Type > Tabs to open the Tabs panel.

   When a text frame has an insertion point and enough space at the top, the Tabs panel snaps to the top of the frame so that the measurements in the panel's ruler exactly match the text. Regardless of the position of the Tabs panel, you can enter values to set tabs with precision.
5. In the Tabs panel, click Left-Justified Tab ( ). This specifies that text aligns to the left of the tab stop.
6. Type **5p5** in the X box, and press Enter or Return.

The information following each tab marker in the selected text now aligns to the new tab stop, which is positioned just above the ruler in the Tabs panel.

7. With the text still selected and the Tabs panel still open, click the new tab stop in the tab ruler to select it. Type a period (.) and a space in the Leader box.

   The Leader box specifies the character or characters that fill the space between the text and the tab stop. Tab leaders are commonly used in tables of contents. Using a space between periods creates a more open dot sequence in the tab leader.
8. Press Enter or Return to apply the tab leader. Leave the Tabs panel open and in position for the next exercise.



9. Choose Edit > Deselect All.

10. Choose File > Save.

Working with tabs

The controls for creating and customizing tabs in InDesign are fairly similar to those in a word processor. You can precisely position tabs, repeat tabs across a column, create leaders for tabs, specify how text aligns with tabs, and easily modify the tabs you've created. Tabs are

paragraph formats, so they apply to the paragraph containing the text insertion point or any selected paragraphs. All the controls are in the Tabs panel, which you open by choosing Type > Tabs. Here's how the tabs controls work.

- Enter tabs: To enter a tab in text, press the Tab key.
- Specify tab alignment: To specify how text aligns with a tab stop—for example, to the left of the tab stop (the traditional setting) or on a decimal point—click one of the tab buttons in the upper-left corner of the Tabs panel: Left-Justified Tab, Center-Justified Tab, Right-Justified Tab, or Align To Decimal (Or Other Specified Character) Tab.
- Position tabs: To position a tab stop, click one of the tab buttons, and then type a value in the X box, and press Enter or Return. You can also click a tab button, and then click in the space just above the ruler.
- Repeat tabs: To create multiple tab stops the same distance apart, select a tab on the ruler. Choose Repeat Tab from the Tabs panel menu. This creates tab stops across the column based on the distance between the selected tab stop and the previous tab stop (or the left indent).
- Specify a character to align text on: To align text on a specific character—for example, a decimal point—click the Align To Decimal (Or Other Specified Character) Tab button, and then type or paste the character into the Align On box. (If the text does not contain that character, text will align to the left of the tab stop.)
- Create a tab leader: To fill the white space between text and tabs—for example, to add periods between text and page numbers in a table of contents—enter up to eight characters to repeat in the Leader box.
- Move tabs: To change the position of a tab stop, select the tab on the ruler and type a new position in the X box. On Windows, press Enter on the keyboard; on Mac OS, press Return. Or, drag the tab on the ruler to a new location.
- Delete tabs: To delete a tab, drag it off the tab ruler. Or, select the tab on the ruler and choose Delete Tab from the Tabs panel menu.
- Reset default tabs: To return to the default tab stops, choose Clear All from the Tabs panel menu. The default tab stop positions vary depending on the document's settings in the Units & Increments panel of the Preferences dialog box. For example, if the Horizontal Ruler is set to Inches, default tab stops are placed at every half-inch.
- Change tab alignment: To change a tab stop's alignment, select it on the ruler, and then click a different tab button. Or, press the Alt (Windows) or Option (Mac OS) key while clicking the tab on the ruler to cycle through the four alignment options.

Creating a hanging indent

In a "hanging indent," text before the tab marker hangs to the left—as you will often see in a bulleted or numbered list. To create a hanging indent for the information in the "If You Go" box, you will use the Tabs panel. You can also use the Left Indent and First Line Left Indent boxes in the Paragraph panel.

1. Using the Type tool ( ), click in the "If You Go" box, and select from the second line (starting with "Name") to the last line (ending with "6–8 p.m.").

Note

If the Tabs panel has moved, click its Position Panel Above Text Frame button (the magnet) at the right.

2. Make sure that the Tabs panel is still aligned directly above the text frame.
3. In the Tabs panel, drag the bottom indent marker on the left side of the ruler to the right until the X value is 5p5.

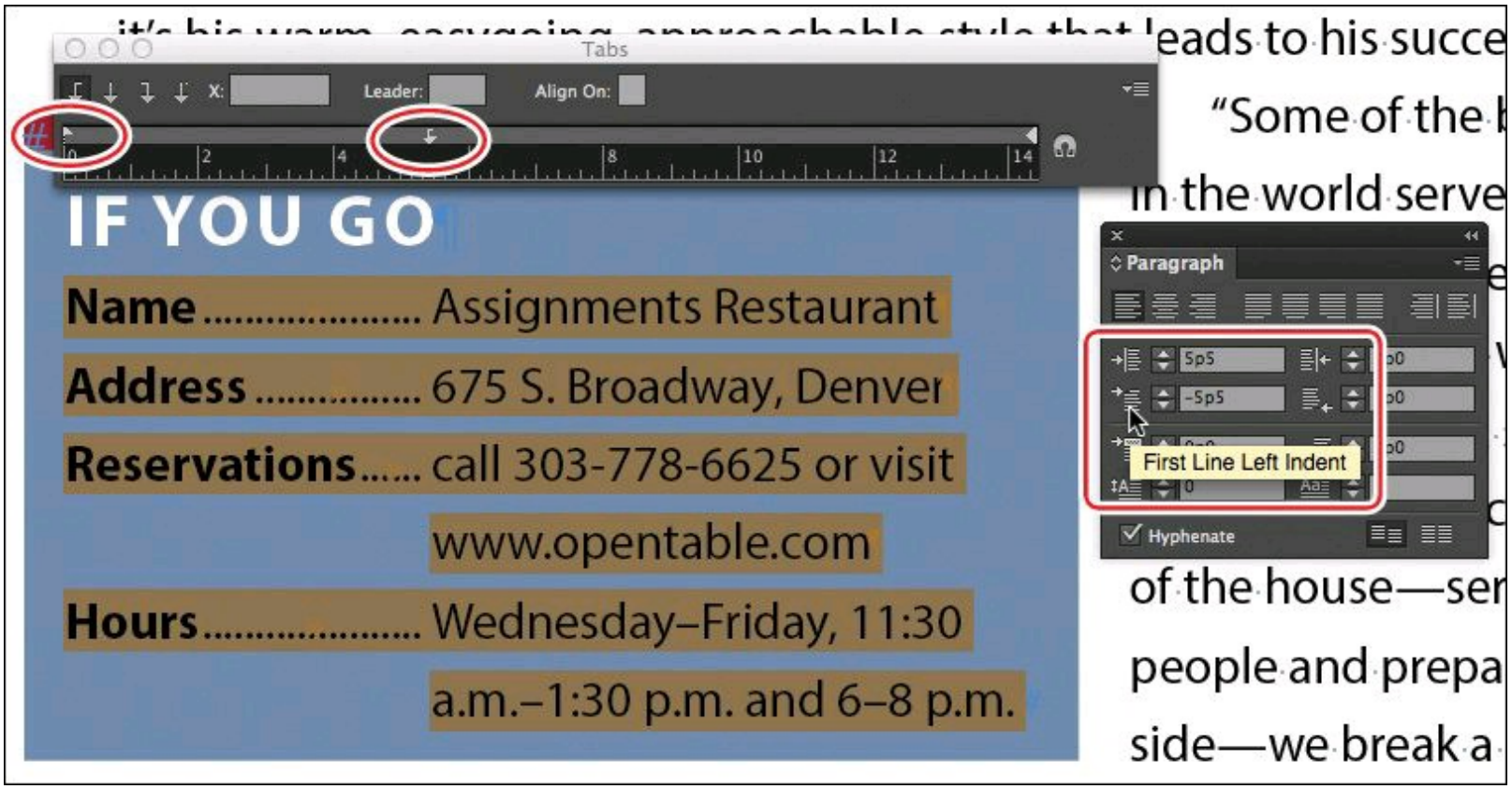
   Dragging the bottom marker moves both the Left Indent and First Line Indent markers at once. Notice how all the text shifts to the right, and the Left Indent value in the Paragraph panel changes to 5p5.

   Keep the text selected. Now you'll bring just the category headings back to their original location in the frame to create a hanging indent.

Tip

You can also adjust the first-line indent for selected paragraphs by dragging the top indent marker on the tab ruler. However, it can be difficult to select the marker without accidentally creating or modifying a tab stop.

4. In the Paragraph panel, type **–5p5** in the First Line Left Indent ( ) box.



5. Deselect the text, and view the hanging indent. Close the Tabs panel.
6. Choose File > Save.

Hanging indents and bulleted lists

You can adjust paragraph indents—including the Left Indent, Right Indent, First Line Left Indent, and Last Line Right Indent—using controls in the Control panel, the Paragraph panel (Type > Paragraph), and the tab ruler (Type > Tabs). In addition to specifying values, you can create hanging indents in the following ways:

- Press the Shift key while dragging the indent markers on the tab ruler. The Shift key lets you drag the indent markers independently.
- Press Control+\ (Windows) or Command+\ (Mac OS) to enter an Indent To Here character anywhere in text. This immediately hangs all the text to the right of the character.
- Choose Type > Insert Special Character > Other > Indent To Here to insert the hanging indent character.

You can use a combination of hanging indents and bullet characters or numerals to create bulleted or numbered lists. A quicker way to do this, however, is to use the Bullets and Numbering feature in the Paragraph panel menu or the Bulleted & Numbered Lists submenu of the Type menu. You can save bulleted list and numbered list formatting as part of a paragraph style.

Adding a rule above a paragraph

You can add a rule, or line, above or below a paragraph. The advantage to using rules rather than simply drawing a line is that rules can be applied with a paragraph style, and they travel with the paragraph when text reflows. For example, you might use both a rule above and rule below in a paragraph style for pull quotes. Or, you might use a rule above a subhead. Paragraph rules can be the width of the column or the text, as follows:

- When the Width is set to Column, the paragraph rule will have the same length as the text column—minus any paragraph indent settings. To extend a rule beyond the paragraph indents, you can enter negative Left Indent and Right Indent values in the Paragraph Rules dialog box.
- When the Width is set to Text, the paragraph rule will have the same length as the line of text to which it applies. For Rule Above, that is the first line of a multi-line paragraph; for Rule Below, it's the last line of the paragraph.

Here you'll add a rule above the author bio at the end of the story.

1. Scroll to view the third column on the right-facing page, which contains the author bio.
2. Using the Type tool (T), click to place an insertion point in the author bio.
3. Choose Paragraph Rules from the Paragraph panel menu.
4. At the top of the Paragraph Rules dialog box, choose Rule Above from the menu, and select Rule On to activate the rule.
5. Select the Preview option. Move the dialog box so that you can see the paragraph.
6. In the Paragraph Rules dialog box, set these options:
   - From the Weight menu, choose 1 pt.
   - From the Color menu, choose the blue-colored swatch (C=97 M=62 Y=21 K=8).
   - From the Width menu, choose Column.
   - In the Offset box, type **p9**.

7. Click OK to apply the changes.

   A blue rule now appears above the author bio.

8. To view your results:
   - Choose Edit > Deselect All.
   - Choose View > Fit Spread In Window.
   - Choose Preview from the Screen Mode menu ( ) in the Application bar at the top of the screen.
   - Press the Tab key to hide all panels.

9. Choose File > Save.

Congratulations, you have finished the lesson. To finalize this article, you would likely spend time with an editor or proofreader to fix any tight or loose lines, awkward line breaks, widows, and orphans.

Exploring on your own

Now that you have learned the basics of formatting text in an InDesign document, you're ready to apply these skills on your own. Try the following tasks to improve your typography skills.

1. Place an insertion point in various paragraphs and experiment with turning hyphenation on and off in the Paragraph panel. Select a hyphenated word and choose No Break from the Character panel menu to stop an individual word from hyphenating.
2. Experiment with different hyphenation settings. First, select all the text in the main story. Then, choose Hyphenation from the Paragraph panel menu. In the Hyphenation Settings dialog box, select Preview, and then experiment with the settings. For example, Hyphenate Capitalized Words is selected for this text, but an editor would probably want to turn it off to prevent the chef's name from hyphenating.
3. Experiment with different justification settings. First, select all the text, and then click Justify With Last Line Aligned Left ( ) in the Paragraph panel. Choose Justification from the Paragraph panel menu. In the Justification dialog box, select Preview and experiment with the

settings. For example, look at the difference that the Adobe Single-line Composer and the Adobe Paragraph Composer make when applied to justified (rather than left-aligned) text.

4. Choose Type > Insert Special Character and view all the options available, such as Symbols > Bullet Character and Hyphens And Dashes > Em Dash. Using these characters rather than hyphens significantly enhances how professional the typography looks. Choose Type > Insert White Space and notice the Nonbreaking Space. Use this to "glue" two words together so they cannot split at the end of a line (such as "Mac OS").

Review questions

1. How do you view the baseline grid?
2. When and where do you use a right-indent tab?
3. How do you hang punctuation outside the edges of a text frame?
4. How do you balance columns?
5. What is the difference between kerning and tracking?
6. What is the difference between the Adobe Paragraph Composer and the Adobe Single-line Composer?

Review answers

1. To view the baseline grid, choose View > Grids & Guides > Show Baseline Grid. The current document view must be at or above the View Threshold value set in the baseline grid preferences. By default, that value is 75%.
2. A right-indent tab, which automatically aligns text with the right margin of a paragraph, is useful for placing end-of-story characters.
3. Select the text frame and choose Type > Story. Select Optical Margin Alignment, which will apply to all the text in the story.
4. Select the text frame with the Selection tool, then click the Balance Columns button in the Control panel or select the Balance Columns option in the Text Frame Options dialog box (Object > Text Frame Options).
5. Kerning adjusts the space between two characters; tracking adjusts the space between a range of selected characters.
6. The Paragraph Composer evaluates multiple lines at once when determining the best possible line breaks. The Single-line Composer looks at only one line at a time when determining line breaks.

8. Working with Color

Lesson Overview

In this lesson, you'll learn how to do the following:

- Set up color management.
- Determine output requirements.
- Add colors to the Swatches panel.
- Apply colors to objects and text.
- Create dashed strokes.
- Create and apply a gradient swatch.
- Adjust the direction of the gradient blend.
- Create and apply a tint.
- Create and apply a spot color.

This lesson will take about 1 hour to complete.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the "Getting Started" section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.

You can create, save, and apply process and spot colors to objects, strokes, and text. The colors you create and save can include tints, mixed inks, and blended gradients. Using a preflight profile helps ensure that the colors output properly.

Getting started

In this lesson, you'll add colors, tints, and gradients to a magazine advertisement for a fictitious chocolate company called Tifflin's Truffles. The ad consists of CMYK and spot colors along with imported CMYK images. Before you get started, however, you will do two things to ensure that the document looks as good in print as it does onscreen: You will review color management settings and use a preflight profile to review the color modes of the imported images.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

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1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.
2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced] and then choose Window > Workspace >

Reset Advanced.

3. Choose File > Open, and open the 08_Start.indd file, in the Lesson08 folder, located inside the Lessons folder in the InDesignCIB folder on your hard disk. If the Missing Fonts dialog box displays, click Sync Fonts.
4. Choose File > Save As, rename the file **08_Color.indd**, and save it in the Lesson08 folder.

Note

The graphics may look pixelated or jagged because of the current Display Performance setting. You will change that later in this lesson.

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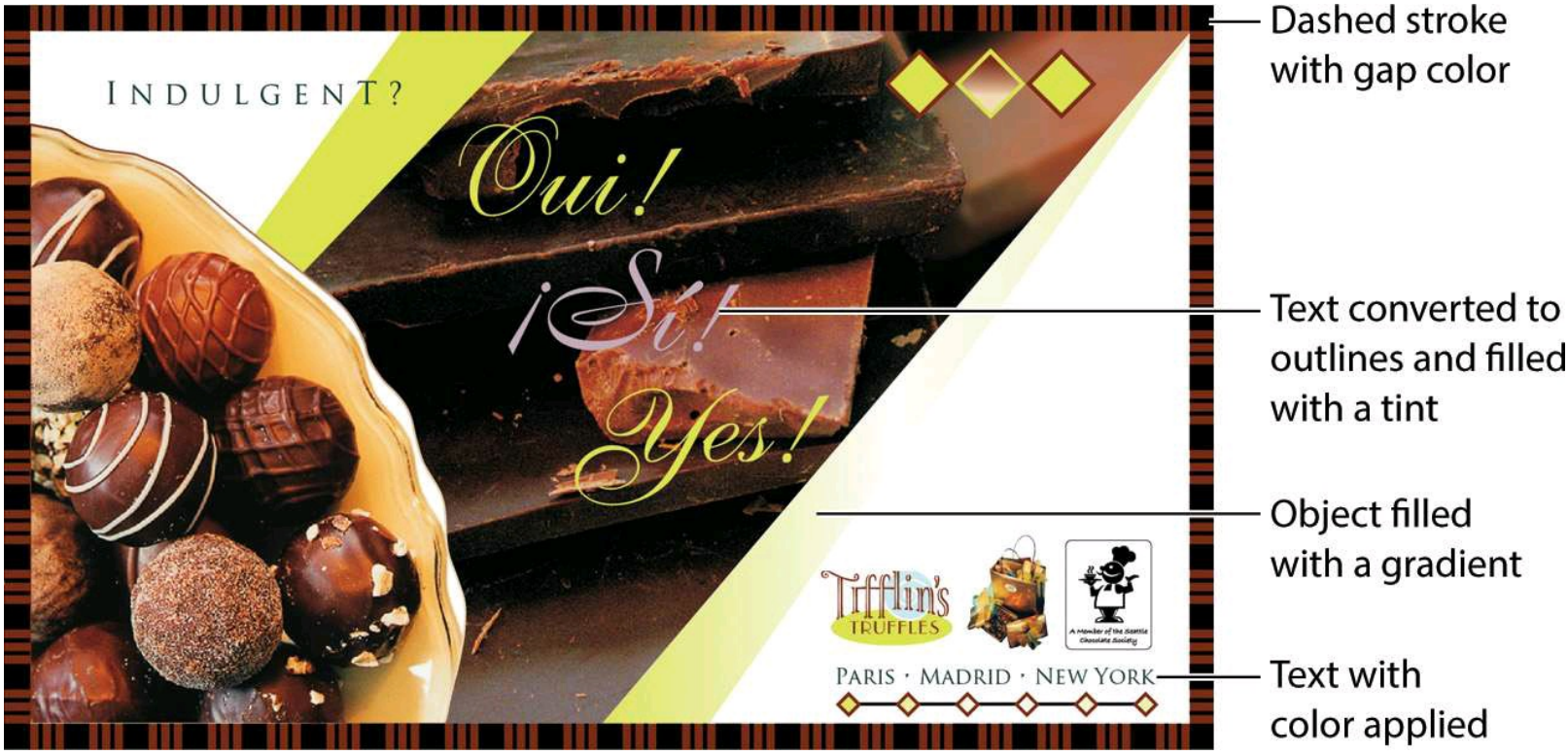
5. If you want to see what the finished document looks like, open the 08_End.indd file located in the same folder. You can leave this document open to act as a guide as you work. When you're ready to resume working on the lesson document, click its tab in the upper-left corner of the document window.



Managing color

Color management works to reproduce colors consistently across a range of output devices, such as monitors, tablets, color printers, and offset presses. InDesign gives you easy-to-use color management features that help you achieve good, consistent color without needing to become a color management expert. With color management enabled out of the box, you'll be able to view colors consistently while ensuring more accurate color from edit to proof to final print.

The need for color management

No screen, film, printer, copier, or printing press can produce the full range of color visible to the human eye. Each device has a specific capability and makes different kinds of compromises in reproducing color images. The unique color-rendering abilities of a specific output device are known collectively as its gamut. InDesign and other graphics applications, such as Adobe Photoshop and

Adobe Illustrator, use color numbers to describe the color of each pixel in an image. The color numbers correspond to the color model, such as the RGB values for red, green, and blue or the CMYK values for cyan, magenta, yellow, and black.

Tip

To achieve consistent color, it's important to periodically calibrate your monitor and printers. Calibration brings your devices into compliance with predefined output standards. Many color experts believe that calibration is the most important aspect of color management.

Color management is simply a way of translating the color numbers for each pixel from the source (the document or image stored on your computer) to the output device (such as your monitor, laptop, tablet, color printer, or high-resolution printing press). Because each source and output device has its own specific gamut (or range) of colors it is capable of reproducing, the aim of the color translation is color accuracy across devices. You can find additional information about color management in the InDesign Help file, online at www.adobe.com (search for color management), in books such as Peachpit's *Real World Color Management,* and in DVDs/videos such as Peachpit's *Color Management without the Jargon: A Simple Approach for Designers and Photographers Using the Adobe Creative Suite.*

Displaying images at full resolution

In a color management workflow, even using default color settings, you should display images at high quality for the best possible color representation that your monitor is capable of showing. When you use lower-resolution image displays, graphics are displayed more quickly, but the colors are less precise.

Tip

You can specify Display Performance defaults in preferences, and you can change the display of an individual object using the Object > Display Performance menu.

To see the difference in one of your documents, experiment with the options in the View > Display Performance menu:

- Fast Display (ideal for quick text editing because images do not display)
- Typical Display (the default)
- High Quality Display (displays raster and vector graphics at high resolution)

For this lesson, choose View > Display Performance > High Quality Display.

Specifying color settings in InDesign

For consistent color in InDesign, you can specify a color settings file (CSF) with preset color management policies and default profiles. The default setting is North America General Purpose 2, which is the best option for beginners.

According to Adobe, "For most color-managed workflows, it is best to use a preset color setting that has been tested by Adobe Systems. Changing specific options is recommended only if you are

knowledgeable about color management and very confident about the changes you make."

In this section, we discuss some of the preset color settings and strategies available in Adobe InDesign that you can use to help achieve consistent color in your projects. However, we will not change any color settings.

Note

The color settings apply to the InDesign application, not to individual documents.

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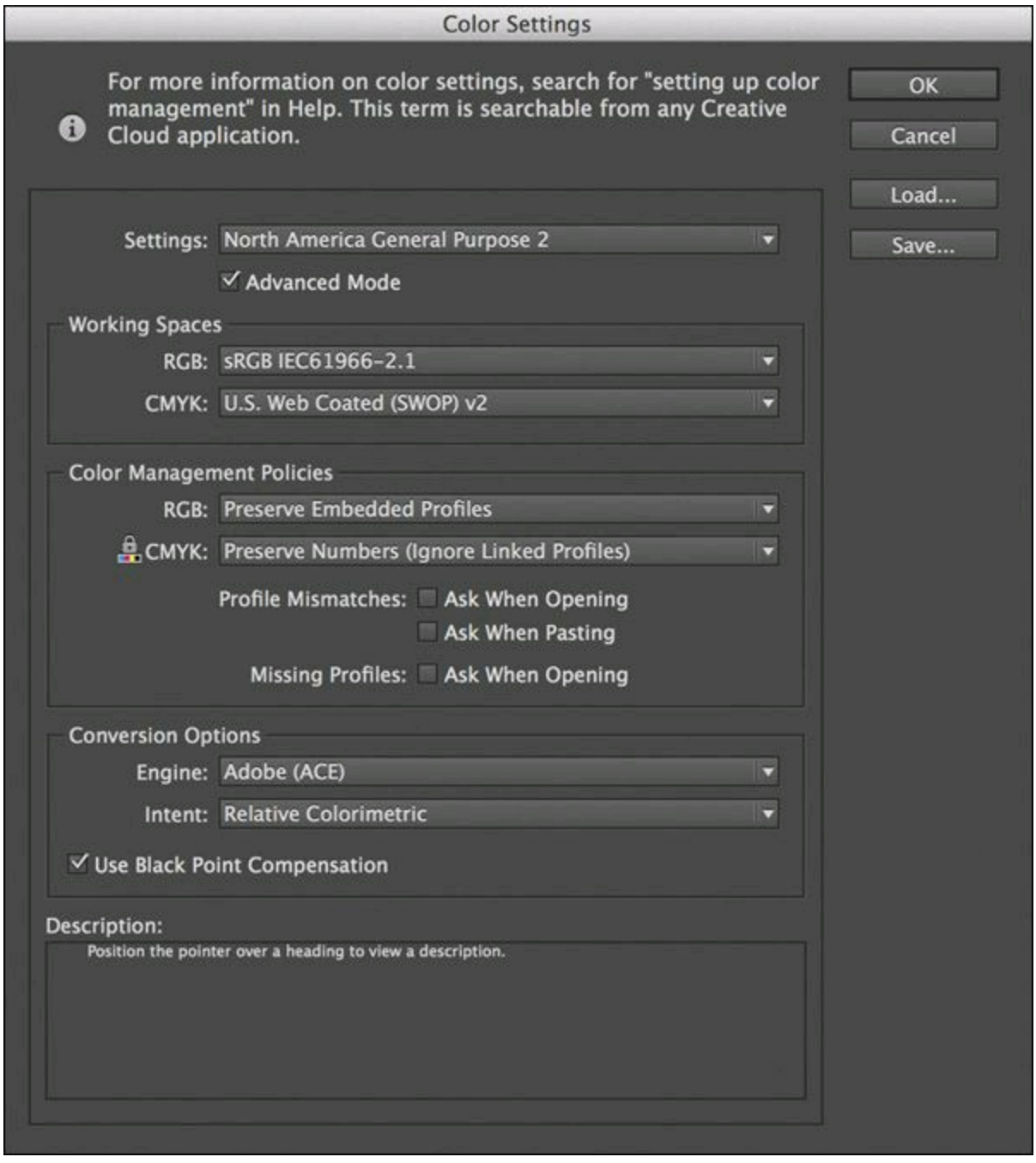
1. Choose Edit > Color Settings.
2. Click the various options in the Color Settings dialog box to see what is available.
3. Point at the Working Spaces title to see a description of this feature in the Description box at the bottom of the dialog box.
4. Point at various other features to see their descriptions.



5. Click Cancel to close the Color Settings dialog box without making changes.

Creating a viewing environment for color management

Your work environment influences how you see color on your monitor and on printed output. For best results, control the colors and light in your work environment by doing the following:

- View your documents in an environment that provides a consistent light level and color temperature. For example, the color characteristics of sunlight change throughout the day and alter the way colors appear onscreen, so keep shades closed or work in a windowless room.
- To eliminate the blue-green cast from fluorescent lighting, you can install D50 (5000° Kelvin) lighting. You can also view printed documents using a D50 light box.
- View your document in a room with neutral-colored walls and ceiling. A room's color can affect the perception of both monitor color and printed color. The best color for a viewing room is neutral gray.
- The color of your clothing reflecting off your monitor may affect the appearance of colors onscreen.
- Remove colorful background patterns on your monitor desktop. Busy or bright patterns surrounding a document interfere with accurate color perception. Set your desktop to display neutral grays only.
- View document proofs in the real-world conditions under which your audience will see the final piece. For example, you might want to see how a housewares catalog looks under the typical light bulbs used in homes, or view an office furniture catalog under the fluorescent lighting used in offices.
- Always make final color judgments under the lighting conditions specified by the legal requirements for contract proofs in your country.

—From InDesign Help

Proofing colors onscreen

When you proof colors onscreen—also known as soft proofing—InDesign attempts to display colors according to specific output conditions. The accuracy of the simulation depends on various factors, including the lighting conditions of the room and whether your monitor is calibrated. To experiment with soft proofing, do the following:

Tip

If a document contains overprinting and will be printed on an offset press, choose View > Overprint Preview in addition to View > Proof Colors.

1. Choose Window > Arrange > New Window for 08_Color.indd to open a second window for your lesson document.
2. Choose Window > Arrange > Tile to display windows for each open document (if you have 08_End.indd open, three windows display).
3. Click the 08_Color.indd:2 window to activate it.
4. Choose View > Proof Colors. You can see a soft proof of the colors according to the current

settings under View > Proof Setup.

5. To customize the soft proof, choose View > Proof Setup > Custom.
6. In the Customize Proof Condition dialog box, click the Device To Simulate menu and review the various presses, desktop printers, and output devices such as monitors available.
7. Select Dot Gain 20% from the Device To Simulate menu, and click OK.

   Grayscale profiles such as Dot Gain 20% let you preview how a document will print in black and white. Notice that the InDesign document's title bar shows which device is being simulated, such as (Dot Gain 20%) or (Document CMYK).

8. Try different soft proofing options.
9. When you're finished reviewing the various soft proofing options, click 08_Color.indd:2's close box to close the second window. Resize and reposition the 08_Color.indd window as necessary.

About monitor calibration and characterization

Profiling software can both *calibrate* and *characterize* your monitor. Calibrating your monitor brings it into compliance with a predefined standard—for example, adjusting your monitor so that it displays color using the graphics arts standard white point color temperature of 5000° K (Kelvin). Characterizing your monitor simply creates a profile that describes how the monitor is currently reproducing color.

Monitor calibration involves adjusting the following video settings: brightness and contrast (the overall level and range of display intensity), gamma (the brightness of the midtone values), phosphors (the substances that CRT monitors use to emit light), and white point (the color and

intensity of the brightest white the monitor can reproduce).

When you calibrate your monitor, you are adjusting it so it conforms to a known specification. Once your monitor is calibrated, the profiling utility lets you save a color profile. The profile describes the color behavior of the monitor—what colors can or cannot be displayed on the monitor and how the numeric color values in an image must be converted so that colors are displayed accurately.

1. Make sure your monitor has been turned on for at least 30 minutes. This gives it sufficient time to warm up and produce more consistent output.
2. Make sure your monitor is displaying thousands of colors or more. Ideally, make sure it is displaying millions of colors or 24-bit or higher.
3. Remove colorful background patterns on your monitor desktop and set your desktop to display neutral grays. Busy patterns or bright colors surrounding a document interfere with accurate color perception.
4. Do one of the following to calibrate and profile your monitor:
   - In Windows, install and use a monitor calibration utility.
   - In Mac OS, use the Calibrate utility, located on the System Preferences > Hardware > Displays > Color tab.
   - For the best results, use third-party software and measuring devices. In general, using a measuring device such as a colorimeter along with software can create more accurate profiles because an instrument can measure the colors displayed on a monitor far more accurately than the human eye.

Note that monitor performance changes and declines over time; recalibrate and profile your monitor every month or so. If you find it difficult or impossible to calibrate your monitor to a standard, it may be too old and faded.

Most profiling software automatically assigns the new profile as the default monitor profile. For instructions on how to manually assign the monitor profile, refer to the Help system for your operating system.

—Condensed from InDesign Help

Defining printing requirements

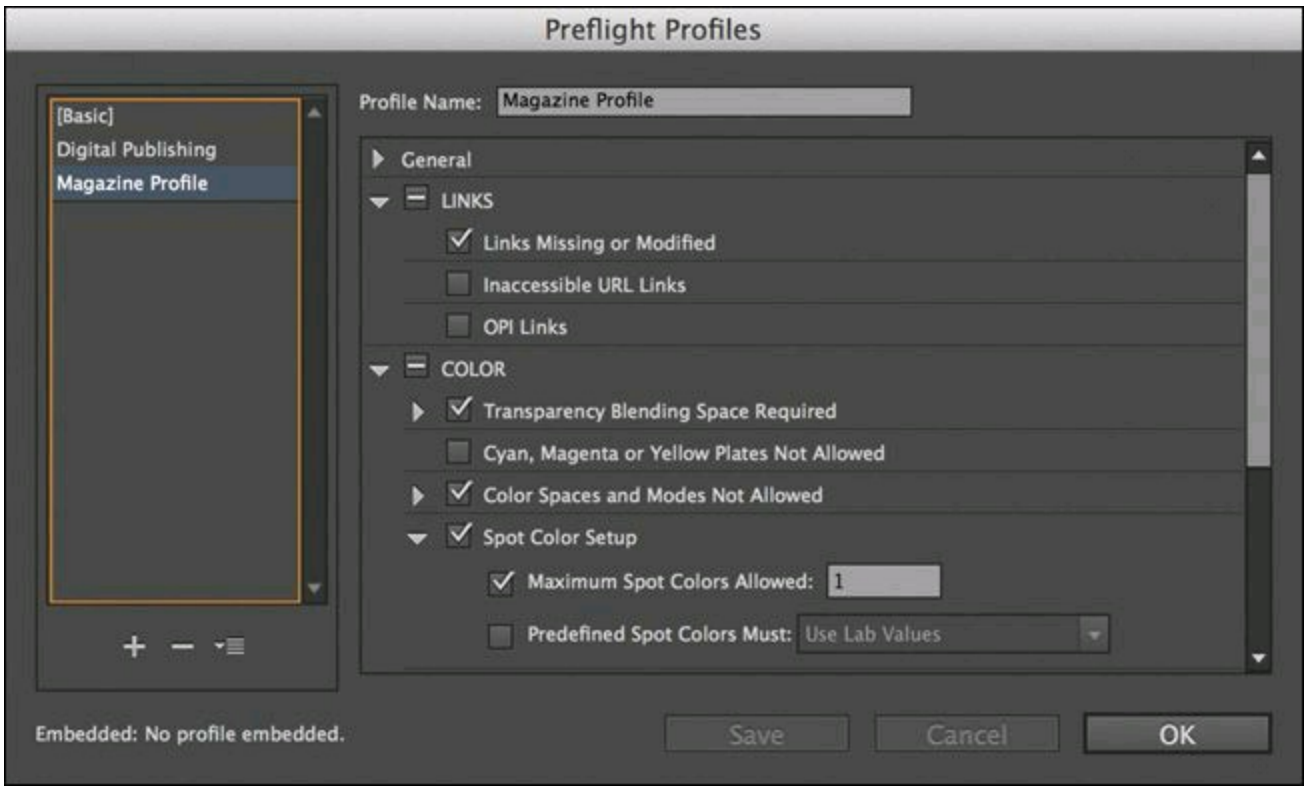
Whether you are working on a document for delivery in a print or digital format, it's a good idea to know the output requirements before you start working. For example, for a print document, meet with your printer and discuss your document's design and use of color. Because printers understand the capabilities of their equipment, they may suggest ways for you to save time and money, increase quality, and avoid potentially costly printing or color problems. The ad used in this lesson was designed to be printed by a commercial printer using the CMYK color model.

Tip

Your service provider or commercial printer may provide a preflight profile with all the necessary specifications for output. You can import the profile and use it to check your work against these criteria.

To confirm that your document matches the printing requirements, you can check it against a preflight profile, which contains a set of rules regarding the document's size, fonts, colors, images, bleeds, and more. The Preflight panel can then alert you to anything in the document that does not follow the rules set in the profile. In this exercise, you will import a preflight profile provided by the printer of a magazine that will publish the ad.

1. Choose Window > Output > Preflight.
2. Choose Define Profiles from the Preflight panel menu ( ).
3. In the Preflight Profiles dialog box, click the Preflight Profile Menu button ( ) below the list of preflight profiles at left. Choose Load Profile.
4. Select the Magazine Profile.idpp file, in the Lesson08 folder, located inside the Lessons folder within the InDesignCIB folder on your hard disk. Click Open.
5. With the Magazine Profile file selected, look through the settings specified for the output of this ad. Checked options are those that InDesign will flag as incorrect. For example, under Color > Color Spaces And Modes Not Allowed, if RGB is checked, any RGB images will be reported as errors.



6. Click OK to close the Preflight Profiles dialog box.

Tip

The lower-left corner of the document window always displays the number of preflight errors in a document. If you start to see a lot of errors, open the Preflight panel to see more information.

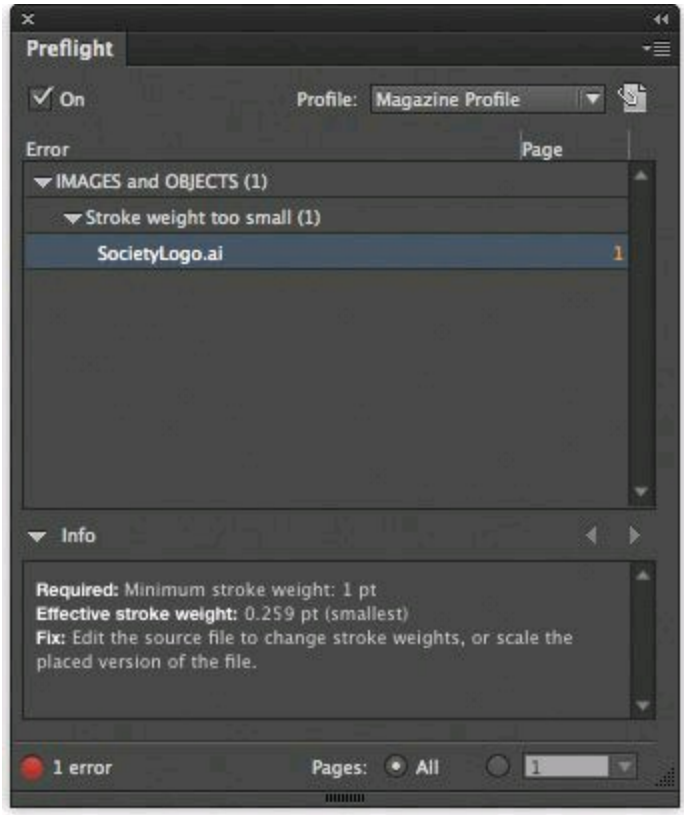
7. From the Profile menu in the Preflight panel, choose Magazine Profile.

Tip

To quickly edit an imported image in its original image-editing application or one of your choice, select the image in the Links panel and choose Edit Original or Edit With from the Links panel menu.

Notice that the profile detects one issue with an imported Illustrator file. If you were actually going to send this ad to the magazine, the error would need to be resolved first.

8. To view the error, click the triangle next to IMAGES And OBJECTS.
9. Click the triangle next to Stroke Weight Too Small.
10. Double-click SocietyLogo.ai, the graphic file name, to view the problem image. For details on the problem, click the triangle next to Info below.



11. Close the Preflight panel.
12. Choose File > Save.

Creating and applying colors

For maximum design flexibility, InDesign provides a variety of methods for creating and applying colors and gradients. The software makes it easy to experiment while helping to ensure proper output. In this section, you will learn a variety of methods for creating and applying colors.

Note

As you work through the lesson, you can move panels around or change the magnification to the level that works best for you. For more information, see "Working with panels" and "Changing the magnification of a document" in Lesson 1.

Adding colors to the Swatches panel

You can add color to objects using a combination of panels and tools. The InDesign color workflow revolves around the Swatches panel. Using the Swatches panel to name colors makes it easy to apply, edit, and update colors for objects in a document. Although you can also use the Color panel to apply colors to objects, there is no quick way to update these colors, which are considered unnamed colors. Instead, if you want to change an unnamed color on multiple objects, you need to change each one individually.

You'll now create most of the colors you'll use in this document. Because this document is intended for a commercial press, you'll be creating CMYK process colors.

1. Make sure that no objects are selected, and then open the Swatches panel. (If the Swatches panel is not visible, choose Window > Color > Swatches.)

   The Swatches panel stores the colors, tints, and gradients that you create and store for reuse.

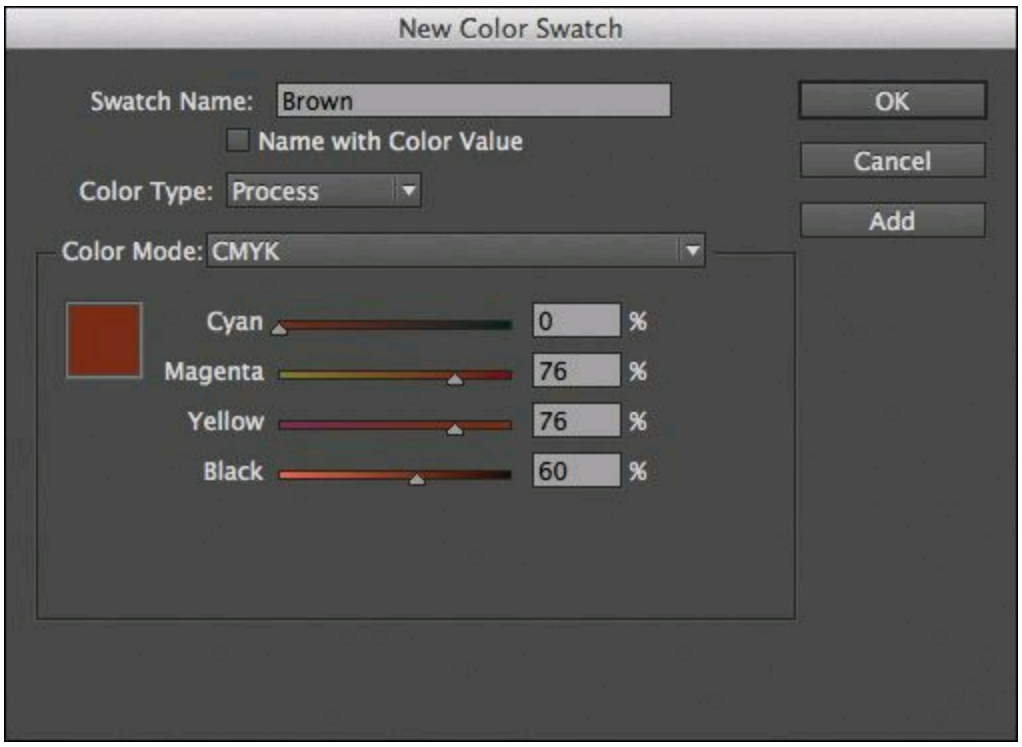
2. Choose New Color Swatch from the Swatches panel menu ( ).

Note

The Name With Color Value option names a color according to the color values you enter; the name automatically updates if you change any color values. This option is available only for process colors and is useful when you want to use the Swatches panel to monitor the exact composition of process-color swatches. For this swatch, you deselected Name With Color Value so that you can use a name (Brown) that's easier to read.

---

3. In the New Color Swatch dialog box, deselect Name With Color Value, and for Swatch Name, type **Brown**. Make sure that Color Type is set to Process and Color Mode is set to CMYK.
4. For the color percentages, type the following values: Cyan (C) = **0**, Magenta (M) = **76**, Yellow (Y) = **76**, Black (K) = **60**.



5. Click Add to include this new color in the Swatches panel, and keep the dialog box open.

InDesign creates a copy of the current color for use as a starting place.

Tip

If you forget to type the name for a color or if you type an incorrect value, double-click the swatch in the Swatches panel, change the name or value, and then click OK.

---

6. Repeat the previous three steps to name and create the following colors:
   - **Blue:** Cyan (C) = **60**, Magenta (M) = **20**, Yellow (Y) = **0**, Black (K) = **0**
   - **Tan:** Cyan (C) = **5**, Magenta (M) = **13**, Yellow (Y) = **29**, Black (K) = **0**

7. When finished, click Done in the New Color Swatch dialog box.

   New colors added to the Swatches panel are stored only with the document in which they are created—although you can import them into other documents. You'll apply these colors to text, images, and strokes in the layout.

8. Choose File > Save.

Applying colors to objects with the Swatches panel

You can apply color swatches from the Swatches panel or the Control panel. There are three general steps to applying a swatch color: (1) selecting the text or object, (2) selecting the stroke or fill option, depending on what you want to change, and (3) selecting the color. You can also drag swatches to objects. In this exercise, you will apply colors to strokes and fills using the Swatches panel.

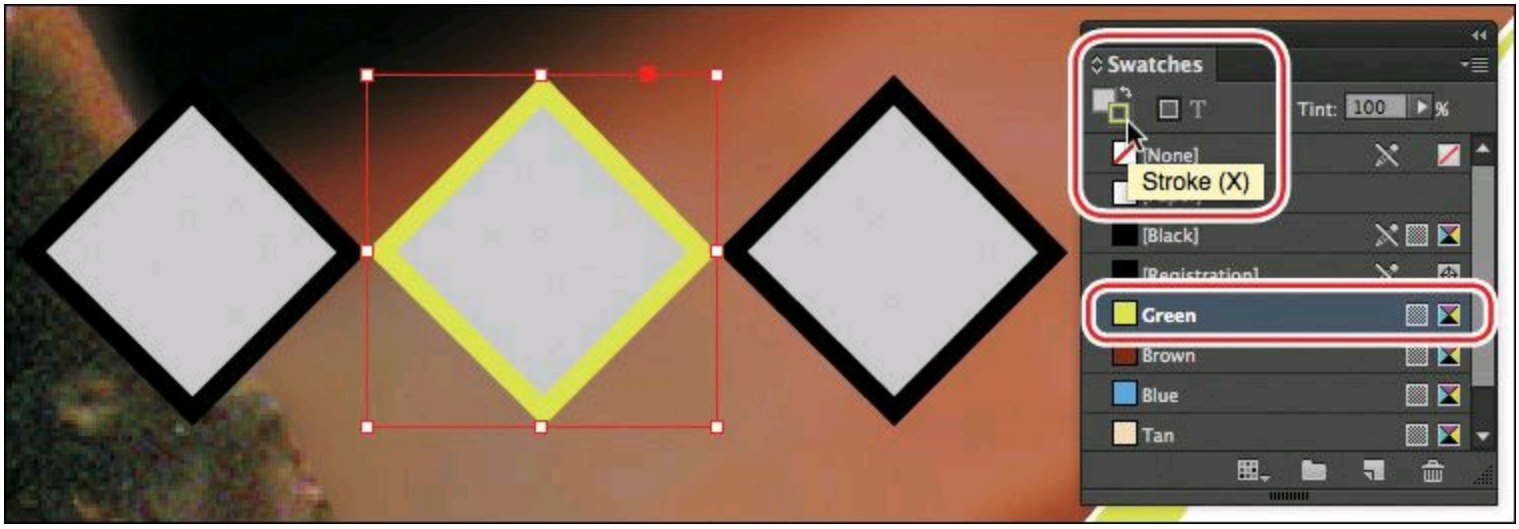
Tip

To increase the zoom level, press Ctrl+= (Windows) or Command+= (Mac OS). To zoom out, press Ctrl+hyphen (Windows) or Command+hyphen (Mac OS).

---

1. Select the Zoom tool ( ) in the Tools panel and drag to draw a marquee around the three diamond shapes in the upper-right corner. Make sure that you can see all three diamond shapes.
2. Using the Selection tool ( ), click in the center diamond.
3. Select the Stroke box ( ) in the Swatches panel.
4. Select the Green swatch (you may need to scroll down in the list of swatches).

The Stroke/Fill toggle ( ) lets you swap the stroke and fill colors of a selected object. The Stroke/Fill box also shows whether the stroke or fill box is currently active. Whenever you apply colors, keep an eye on this box, as it's easy to apply color to the wrong part of an object.



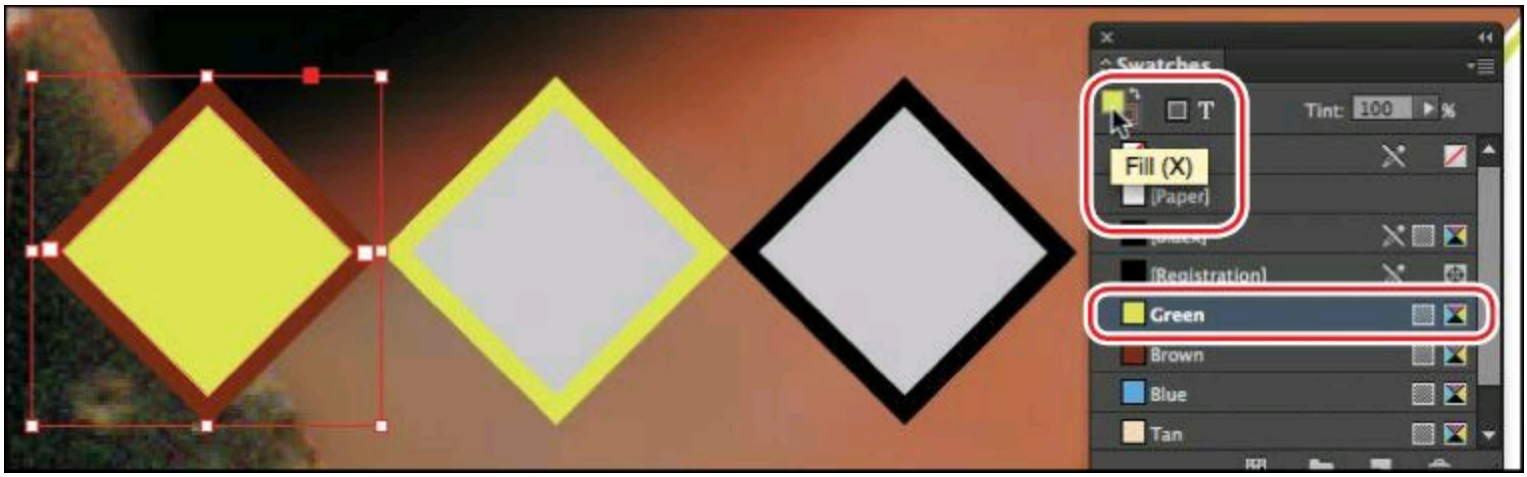
The stroke of the center diamond shape is now green.

Tip

If you apply color to the wrong object or the wrong part of an object, you can always choose Edit > Undo and try again.

---

5. Select the diamond on the left. Select Brown in the Swatches panel to apply a brown stroke.
6. With the diamond on the left still selected, select the Fill box ( ) in the Swatches panel, and then select the Green swatch.



Applying colors with the Eyedropper tool

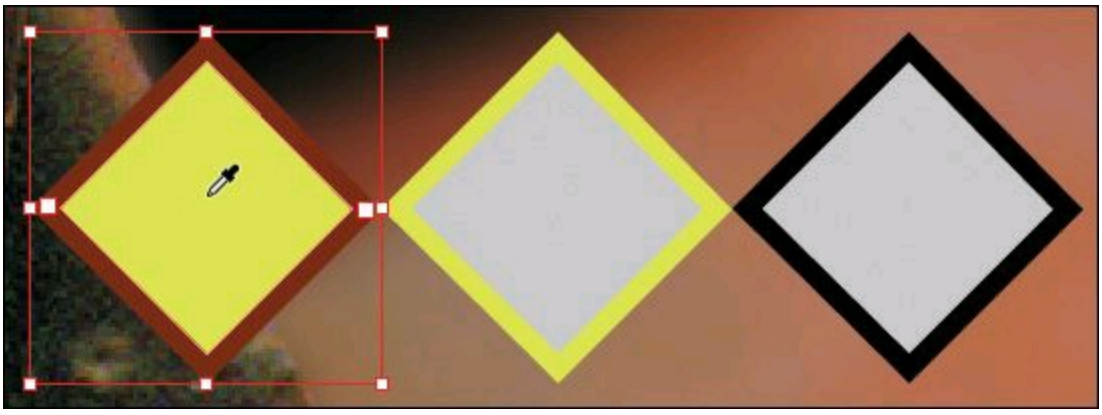
The diamond on the right requires the same Brown stroke and Green fill. You'll use the Eyedropper tool to copy the stroke and fill attributes in one quick step. In addition, you will apply InDesign's [Paper] color using the Fill box on the Tools panel rather than using the Swatches panel.

Tip

[Paper] is a special color that simulates the paper color on which you're printing.

---

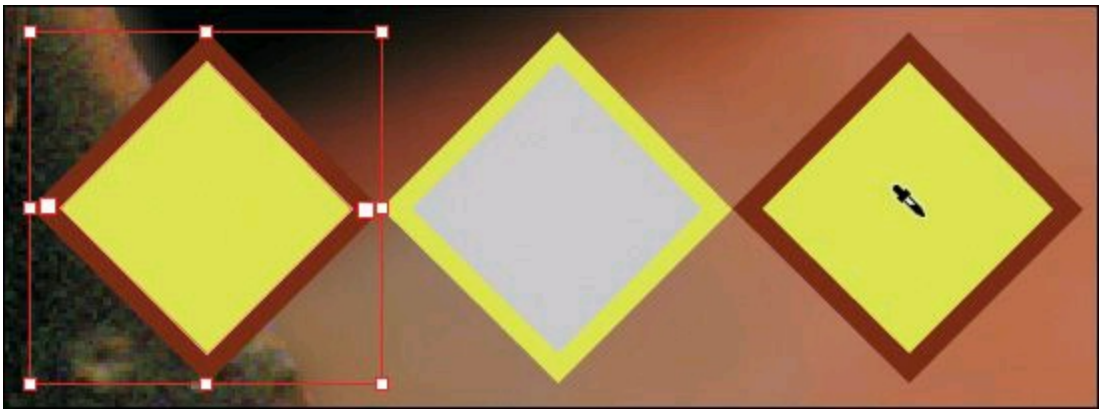
1. Select the Eyedropper tool ( ), and click the diamond on the left.



Notice that the Eyedropper tool is now filled ( ), indicating that it picked up the attributes from that object.

2. With the loaded Eyedropper tool, click the gray background of the diamond on the right.

That diamond now has the fill and stroke attributes of the diamond on the left.



Now you'll change the fill color of the diamond in the center to [Paper].

3. Using the Selection tool ( ), click the diamond in the center.
4. Select the Fill box ( ) in the Tools panel, and then click [Paper] in the Swatches panel.
5. Choose Edit > Deselect All, and then choose View > Fit Page In Window.

Applying colors to objects with the Control panel

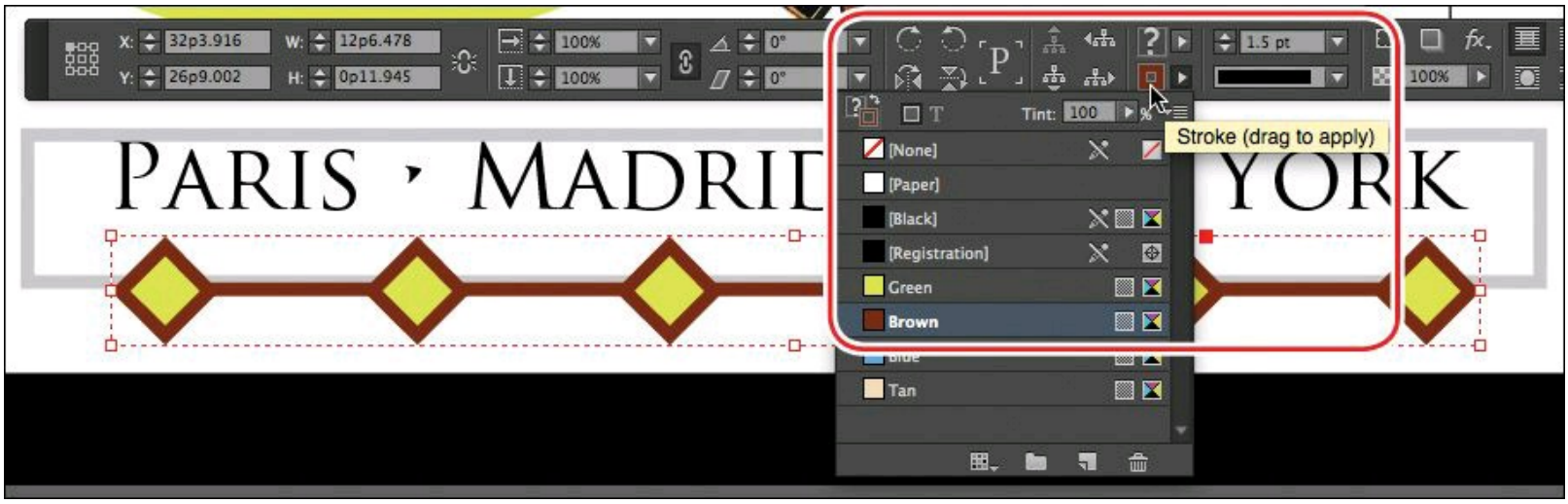
Now you'll apply a brown stroke to the six small diamonds at the bottom of the ad.

Tip

If a document contains many color swatches that are intended for specific purposes (such as chapter openers or divider pages), you can group the swatches. panel. To create a new color group, choose New Color Group from the Swatches panel menu and drag swatches into it.

---

1. Using the Selection tool ( ), click one of the diamonds to select the group.
2. In the center of the Control panel, locate the Fill and Stroke controls. Click the Stroke menu to see the available colors.
3. Select the Brown swatch (if necessary, scroll down to see it).
4. Choose File > Save.



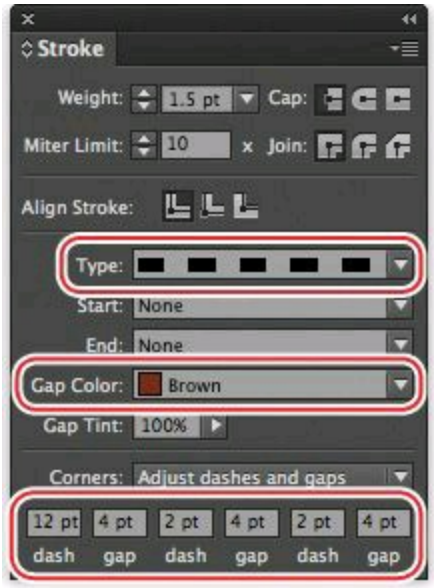
Creating dashed strokes

You'll now change the black line that borders the ad to a custom dashed line. Because you are using the custom dashed line on only one object, you will create it using the Stroke panel. If you need to save a stroke for repetitive use throughout a document, you can easily create a stroke style. For more information about saving stroke styles, including dashes, dots, and stripes, see InDesign Help.

In this exercise, you will specify a dashed stroke for the frame on the ad and then customize the dashes.

1. Choose Edit > Deselect All. If necessary, choose View > Fit Page In Window.
2. Using the Selection tool ( ), select the black outline that borders the ad.
3. Choose Window > Stroke to display the Stroke panel.
4. From the Type menu in the Stroke panel, select Dashed (the last option).

   Six dash and gap boxes appear at the bottom of the Stroke panel. To create a dashed line, you specify the length of the dashes and then the gaps, or spacing, between the dashes. Usually, you need to experiment with the values to achieve a desired effect.
5. Choose Brown from the Gap Color menu to fill the gaps with brown.
6. Type the following values in the Dash and Gap boxes: **12**, **4**, **2**, **4, 2, 4** (press Tab after you type each value to move to the next box).

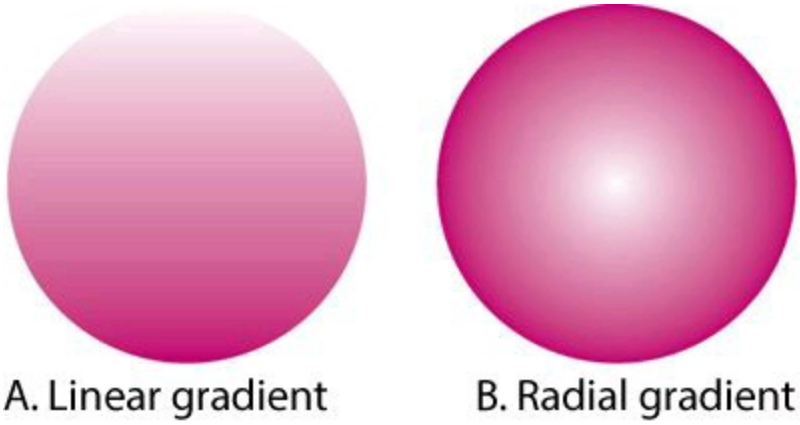


7. Choose Edit > Deselect All and close the Stroke panel.

8. Choose File > Save.

Working with gradients

A gradient is a graduated blend between two or more colors or between tints of the same color. You can create either a linear or a radial gradient. In this exercise, you will create a linear gradient with the Swatches panel, apply it to several objects, and adjust the gradients with the Gradient tool.



Tip

It's a good idea to test gradients on the intended output device, whether it's a tablet, inkjet printer, or press.

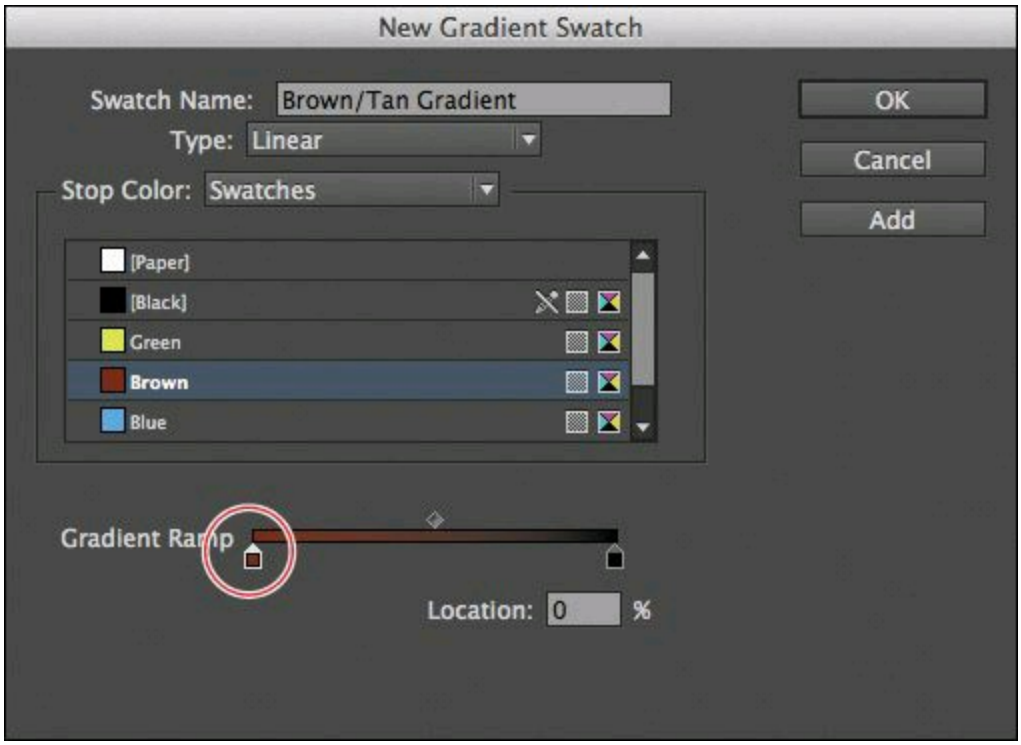
Creating and applying a gradient swatch

Every InDesign gradient has at least two color stops. By editing the color mix of each stop and adding additional color stops, you can create custom gradients.

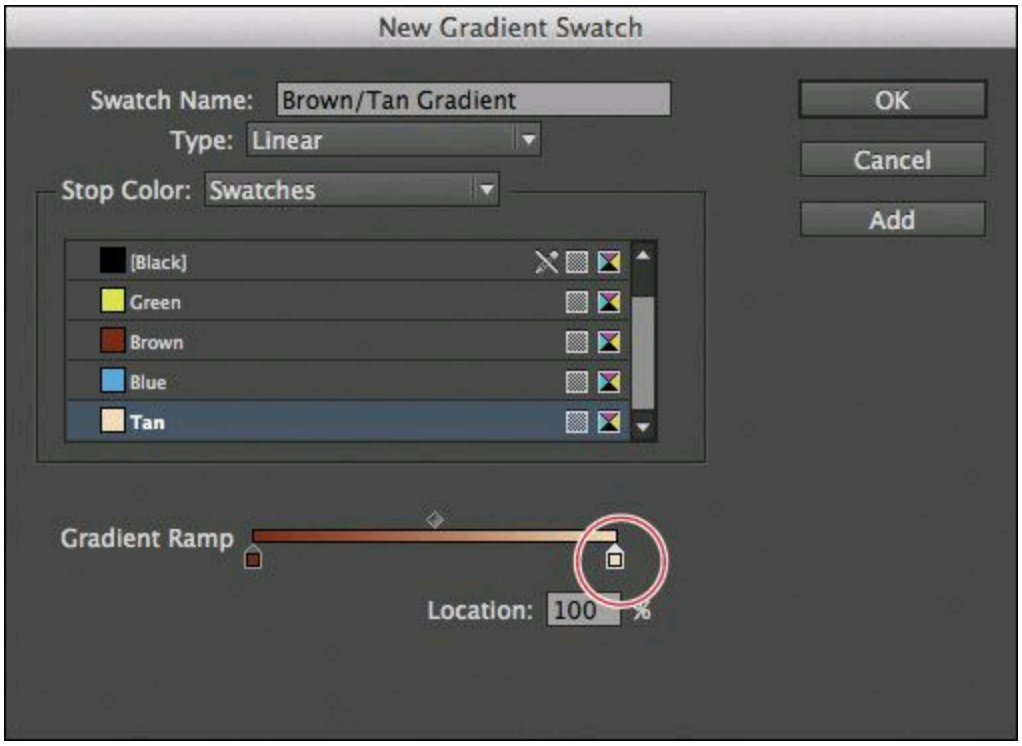
1. Choose Edit > Deselect All to make sure no objects are selected.
2. Choose New Gradient Swatch from the Swatches panel menu ( ).

   In the New Gradient Swatch dialog box, gradients are defined by a series of color stops in the gradient ramp. A stop is the point at which each color is at full intensity between the transitions; it is identified by a square below the gradient ramp.
3. For Swatch Name, type **Brown/Tan Gradient**. Leave the Type menu set to Linear.
4. Click the left stop marker ( ). From the Stop Color menu, select Swatches, and then scroll down the list and select Brown.

   Notice that the left side of the gradient ramp is now brown.



5. Click the right stop marker (). From the list of colors, select Tan.

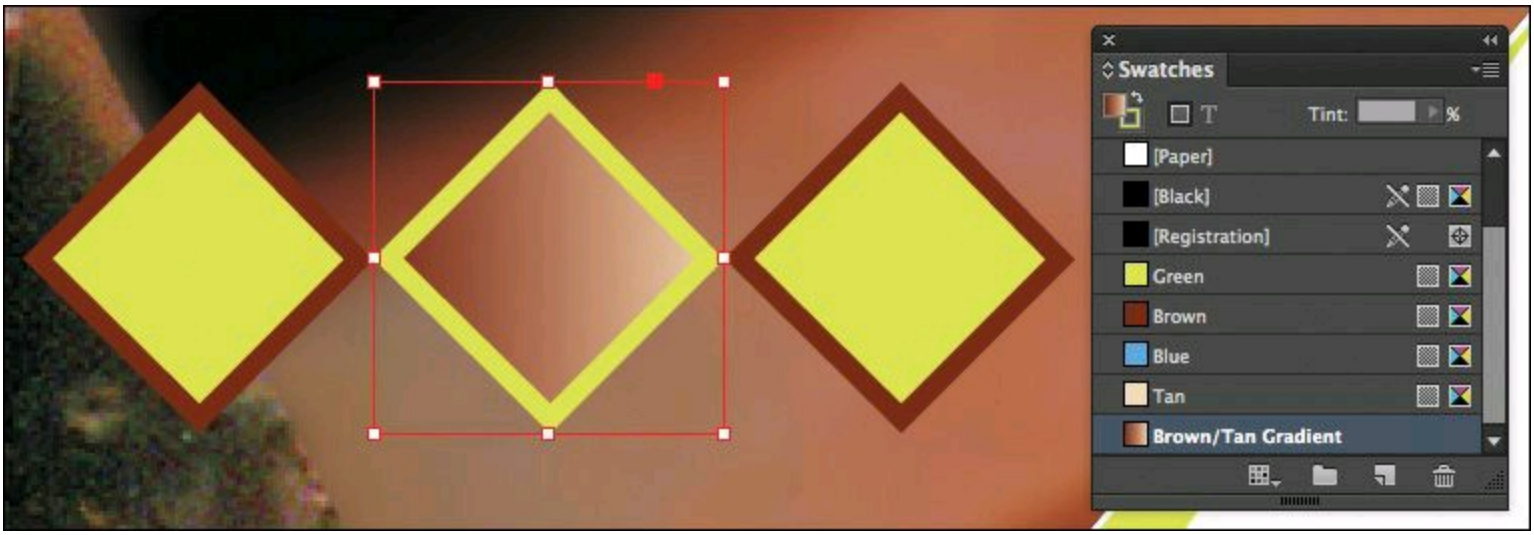


The gradient ramp shows a color blend between brown and tan.

6. Click OK. The new gradient swatch appears in the Swatches panel.

Now you'll apply the gradient to the fill of the center diamond in the upper-right corner of the layout.

7. Zoom in on the upper-right corner, bringing the three diamond shapes into view.
8. Select the center diamond with the Selection tool ().
9. Select the Fill box () in the Tools panel, and then click Brown/Tan Gradient in the Swatches panel.
10. Choose File > Save.



Adjusting the direction of the gradient blend

Once you have filled an object with a gradient, you can modify the gradient by using the Gradient Swatch tool to "repaint" the fill along an imaginary line that you draw. This tool lets you change the direction of a gradient and change its beginning point and end point. You'll now change the direction

of the gradient.

Tip

When using the Gradient Swatch tool, the farther away you start from the outer edges of the object, the more gradual the gradient blend will be.

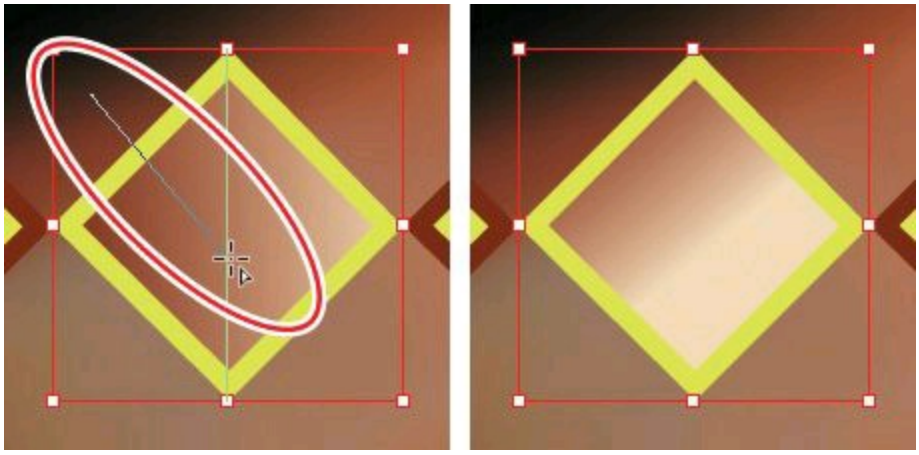
---

1. Make sure the center diamond is still selected, and then select the Gradient Swatch tool ( ) in the Tools panel.

   Now you'll experiment with the Gradient Swatch tool to see how you can change the direction and intensity of the gradient.

2. To create a more gradual gradient effect, position the cursor outside of the selected diamond and drag as shown below.

   When you release the mouse button, you'll notice that the transition between brown and tan is more gradual than it was before you dragged the Gradient Swatch tool.



Tip

To constrain gradient angles to horizontal, vertical, or 45 degree angles, press the Shift key while dragging with the Gradient tool.

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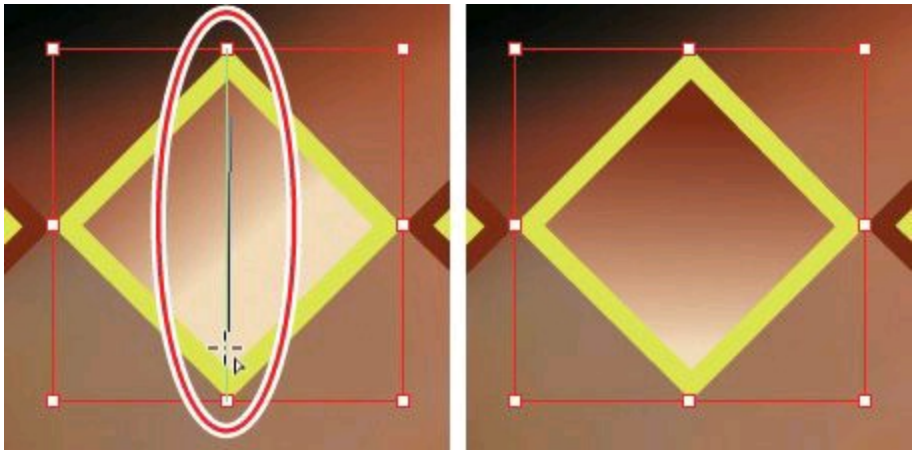
3. To create a sharper gradient, drag a small line in the center of the diamond using the Gradient Swatch tool. Continue to experiment with the Gradient Swatch tool in the diamond so that you understand how it works.

4. When you are finished experimenting, drag from the top to the bottom of the diamond. That's how you'll leave the gradient of the center diamond.



5. Choose File > Save.

About spot and process colors

A spot color is a special premixed ink that is used instead of, or in addition to, CMYK process inks. Each spot color requires its own printing plate on a printing press, so use spot color when few colors are specified and color accuracy is critical. Spot color inks can accurately reproduce colors that are outside the gamut of process colors. However, the exact appearance of the printed spot color is determined by the combination of the ink as mixed by the commercial printer and the paper it's printed on, not by color values you specify or by color management.

A process color is printed using a combination of the four standard process inks: cyan, magenta, yellow, and black (CMYK). Use process colors when a job requires so many colors that using individual spot inks would be expensive or impractical, as when printing color photographs.

- For best results in a high-quality printed document, specify process colors using CMYK values printed in process color reference charts, such as those available from a commercial printer.
- The final color values of a process color are its values in CMYK, so if you specify a process color using RGB (or LAB, in InDesign), those color values are converted to CMYK when you print color separations. These conversions differ based on your color-management settings and document profile.
- Don't specify a process color based on how it looks on your monitor, unless you are sure you have set up a color-management system properly and you understand its limitations for previewing color.
- Avoid using process colors in documents intended for onscreen viewing because CMYK has a smaller color gamut than that of a typical monitor.

Sometimes it's practical to use process and spot inks in the same job. For example, you might use one spot ink to print the exact color of a company logo on the same pages of an annual report where photographs are reproduced using process color. You can also use a spot-color printing plate to apply a varnish over areas of a process color job. In both cases, your print job would use a total of five inks—four process inks and one spot ink or varnish.

—Condensed from InDesign Help

Tip

Each spot color you create generates an additional spot-color plate for the press. In general, commercial printers produce either two-color (using black and one spot color) or four-color CMYK work, with the possibility of adding one or more spot colors. Using spot colors typically increases printing costs. It is a good idea to consult with your printer before using spot colors in a document.

Creating a tint

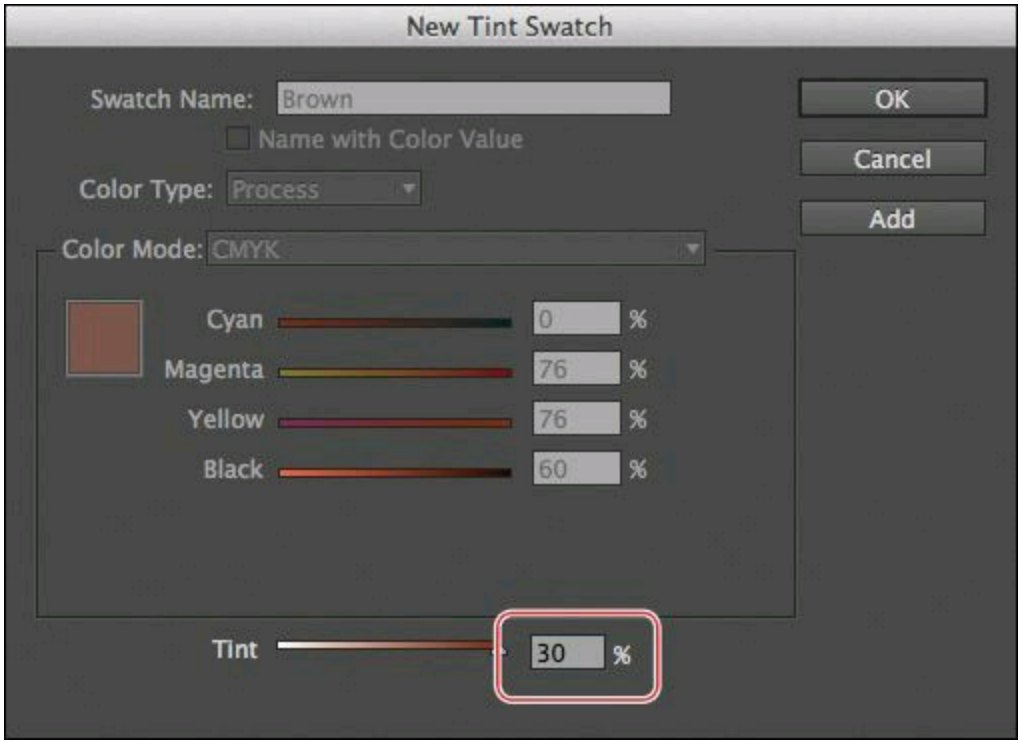
As well as adding colors and gradients, you can add tints to the Swatches panel. A tint is a screened (lighter) version of a color that you can apply quickly and consistently. You'll now create a 30% tint of the brown swatch you saved earlier in this lesson.

Tip

Tints are helpful because InDesign maintains the relationship between a tint and its parent color. For example, if you change the Brown color swatch to a different color, the tint swatch you create in this exercise becomes a lighter version of the new color.

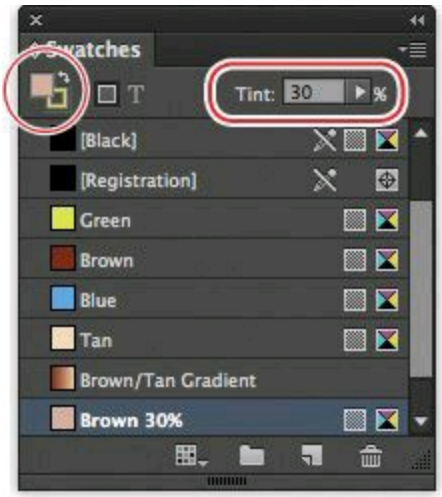
---

1. Choose View > Fit Page In Window to center the page in the document window.
2. Choose Edit > Deselect All.
3. Select Brown in the Swatches panel.
4. Choose New Tint Swatch from the Swatches panel menu ( ).
5. In the New Tint Swatch dialog box, the Tint option at the bottom is the only option you can modify. Type **30** in the Tint box, and then click OK.



The new tint swatch appears at the bottom of the list of swatches. The top of the Swatches panel displays information about the selected swatch, with a Fill/Stroke box showing that the Brown

30% tint is currently the selected fill color and a Tint box showing that the color is 30% of the original Brown color.



6. Using the Selection tool ( ), click the word "¡Sí!" in the center of the page.
7. Make sure the Fill box ( ) is selected, and then click the Brown tint that you just created in the Swatches panel. Notice how the color changes.

8. Choose File > Save.

Creating a spot color

This ad will be printed by a commercial printer using the standard CMYK color model, which requires four separate plates for printing—one each for cyan, magenta, yellow, and black. However, the CMYK color model has a limited range of colors, which is where spot colors are useful. Because of this, spot colors are used to create additional colors beyond the range of CMYK (for example, metallic inks) and to ensure consistent colors (for example, for use in company logos).

In this ad, the design calls for a spot ink not found in the CMYK color model. You'll now add a spot color from a color library. In a real-world scenario, you would need to contact the magazine publisher to ensure that the ad can include a spot color.

Tip

When selecting PANTONE colors for print, it's a good idea to select them from a printed PANTONE color guide, available from www.pantone.com.

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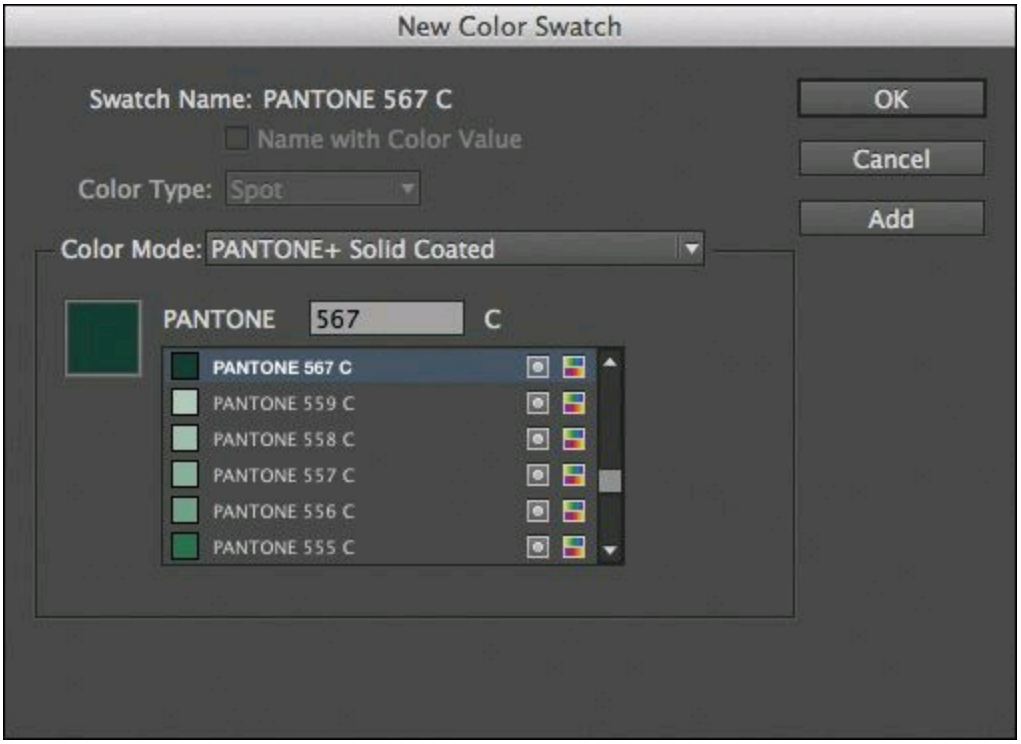
1. Choose Edit > Deselect All.
2. Choose New Color Swatch from the Swatches panel menu ( ).
3. In the New Color Swatch dialog box, choose Spot from the Color Type menu.
4. Select PANTONE+ Solid Coated from the Color Mode menu.
5. In the PANTONE C box, type **567** to automatically scroll the list of Pantone swatches to the color you want for this project, which is PANTONE 567 C.



6. Click OK. The spot color is added to your Swatches panel.

   The icon ( ) next to the color name in the Swatches panel indicates that it is a spot color.

Applying colors to text and objects

You can apply a color swatch to the fill and/or stroke of selected characters and objects—including text that is converted to outlines, as shown in the script text in the center of this ad. You will apply a color to a font and outlines here.

Tip

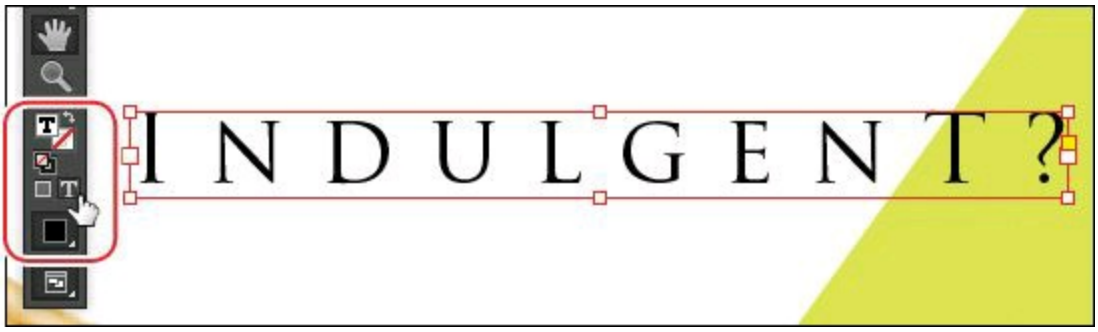
To convert text to outlines, select the text frame with the Selection tool, then choose Type

> Create Outlines. You can also select characters with the Type tool and convert them to anchored objects.

Applying colors to text

As with objects, you can apply a stroke or fill to text. You'll apply colors to the text on the top and bottom of the document.

1. Using the Selection tool ( ), select the text frame containing the word "Indulgent?" at the top left.
2. In the Tools panel, click the Formatting Affects Text button ( ), below the Fill box. Then, make sure the Fill box ( ) is selected.



3. In the Swatches panel, click PANTONE 567 C, and then click a blank area to deselect the text frame. The text now appears in the spot color.
4. Press T to select the Type tool ( ). In the lower-right corner, select the words "Paris • Madrid • New York."
5. If necessary, click the Character Formatting Controls icon ( ) in the Control panel.
6. Locate the Fill and Stroke controls in the center of the Control panel. Click the Fill menu to see the available colors.
7. Select the PANTONE 567 C swatch (if necessary, scroll down to see it).

8. Choose Edit > Deselect All, then choose File > Save.

Applying colors to additional objects

The script text in the center of the page is converted to outlines so the document does not require the original font used. In this case, each word was converted to a single object. You will now apply the

same color used by the outlined text “Oui!” to the outlined text “Yes!” First, you’ll magnify the view of the outlined text “Oui!” to see which color is used.

Tip

You might convert text to outlines to create a text-shaped object to fill with an image or to adjust the shapes of characters.

---

1. In the Tools panel, select the Zoom tool ( ), and then drag to place a marquee around the script text in the middle of the page.
2. Select the Direct Selection tool ( ) and click the text “Oui!”

Note

When you select an object with the Direct Selection tool, you can adjust its contours, as you can see here.

Notice that the corresponding swatch in the Swatches panel becomes highlighted when you select the object to which the swatch is applied.

Now you’ll apply this color to the “Yes!” text.

3. Make sure that the Tint setting in the Swatches panel is 100%.
4. Drag the Green color swatch from the Swatches panel to the text “Yes!” Be sure to drop it inside the object and not on the object’s stroke.

   The pointer changes to an arrow with a black box ( ) when you drop the swatch onto the fill of the text. An arrow with a line to the right ( ) appears if you drag the swatch onto the stroke of the text.

Creating another tint

First, you'll apply the Blue swatch to text, but then decide that a different shade would look better. You'll then create a tint based on the Blue color. If you edit the Blue color, the tint that is based on the color also changes.

1. Choose Edit > Deselect All.
2. Select the frame containing "¡Sí!" with the Selection tool ( ) and click the Blue swatch for the fill color.

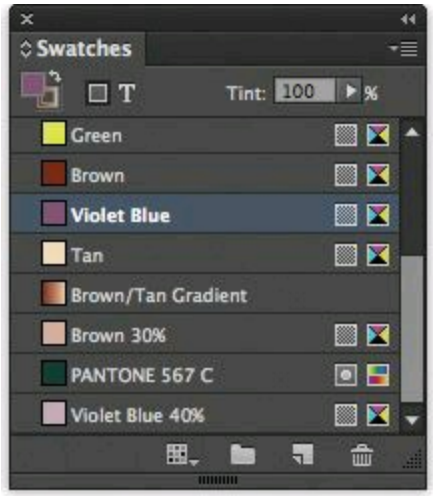
3. With Blue selected in the Swatches panel, select New Tint Swatch from the Swatches panel menu ( ). Type **40** in the Tint box, and then click OK.
4. With the "¡Sí!" text still selected, click the Blue 40% swatch for the fill color.
5. Choose Edit > Deselect All.

   Next, you'll change the Blue color. Blue 40% is based on the Blue swatch, so the tint also changes.
6. Double-click the Blue swatch (not the Blue tint swatch) to change the color.
7. In the Swatch Name box, type **Violet Blue**. For the color percentages, type the following values: C = **59**, M = **80**, Y = **40**, K = **0**.

8. Click OK.

   The name and color of the color swatch, and the tint swatch based on it, are updated in the Swatches panel.

9. Choose File > Save.



Using advanced gradient techniques

InDesign lets you create gradients of multiple colors and control the point at which the colors blend. In addition, you can apply a gradient to individual objects or to a collection of objects.

Creating a gradient swatch with multiple colors

Earlier in this lesson, you created a gradient with two colors—brown and tan. Now you'll create a gradient with three stops so that a yellow/green color on the outside fades to white in the middle.

1. Choose Edit > Deselect All.
2. Choose New Gradient Swatch from the Swatches panel menu, and then type **Green/White Gradient** in the Swatch Name box.

   Leave the Type setting at Linear. The colors from the previous blend appear in the gradient ramp at the bottom of the New Gradient Swatch dialog box.
3. Click the left stop marker (), choose Swatches from the Stop Color menu, and select the Green swatch in the list box.
4. Click the right stop marker (), choose Swatches from the Stop Color menu, and select the Green swatch in the list box.

Note

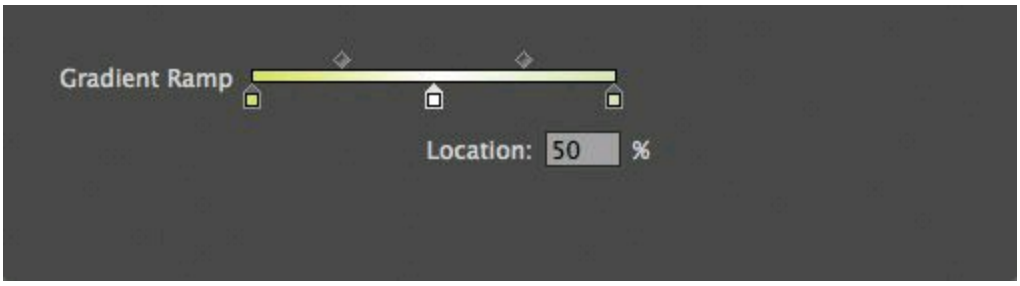
If you press the Shift key while you adjust one color value, the other color values adjust in proportion automatically.

---

5. With the right stop marker still selected, choose CMYK from the Stop Color menu. While pressing the Shift key, drag the Yellow slider until the % value for Yellow is 40% and then release.

   The gradient ramp is now made up of Green and light Green. Now you'll add a stop marker to the middle so that the color fades toward the center.

6. Click just below the center of the gradient ramp to add a new stop.



7. For Location, type **50** to center the stop. Press Tab to implement the value.
8. For Stop Color, select CMYK, and then drag each of the four color sliders to 0 (zero) to create white.
9. Click OK, and then choose File > Save.

Applying the gradient to an object

Now you'll apply the new gradient swatch you just created. First, change the zoom level so that you can see the entire page.

Tip

When creating gradient swatches, you can include tints of swatches. To do this, first create the tint swatches in the Swatches panel. You can then select them while creating a gradient swatch.

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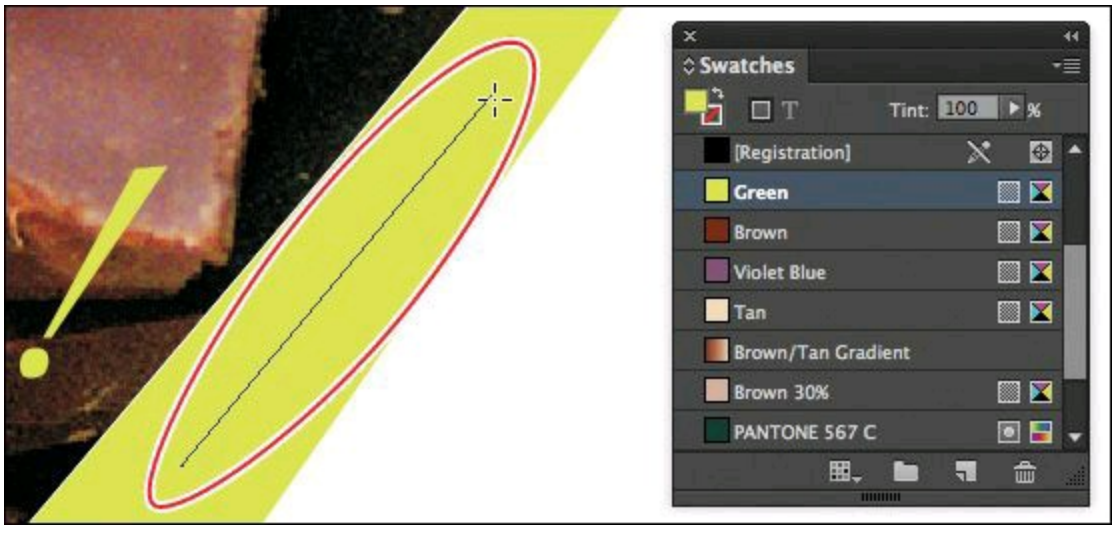
1. Choose View > Fit Page In Window or double-click the Hand tool ( ) in the Tools panel to achieve the same result.
2. With the Selection tool ( ), select the diagonal green stripe to the right of the chocolate bar picture. (The rectangular bounding box of the diagonal line is selected.)
3. Select the Fill box ( ) in the Tools panel, and then select Green/White Gradient in the Swatches panel.
4. To adjust the gradient transition, select the Gradient Swatch tool ( ) in the Tools panel and drag up and to the right of the object, as shown. Results will vary according to where you start dragging.

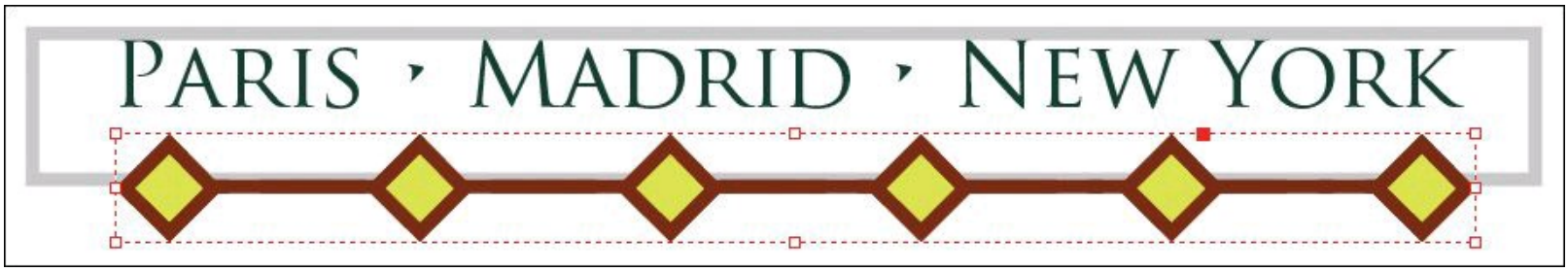


5. Choose Edit > Deselect All, then choose File > Save.

Applying a gradient to multiple objects

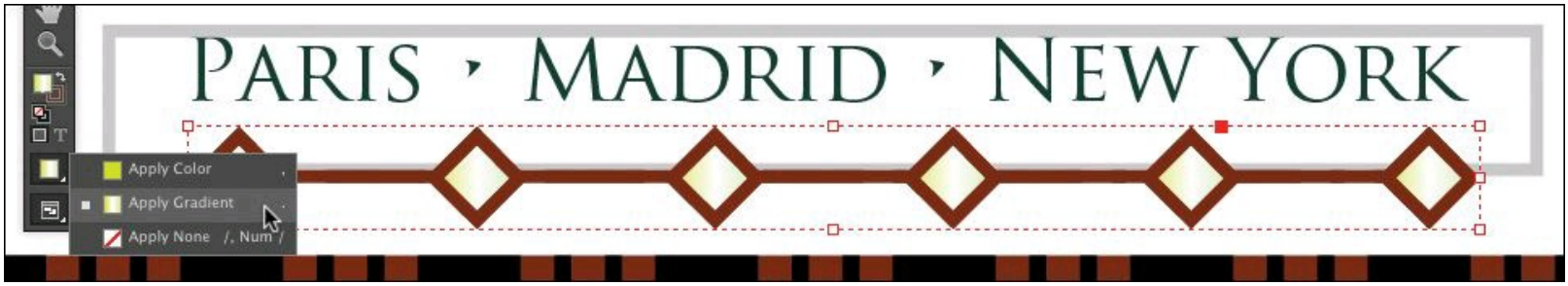
Previously in this lesson, you used the Gradient Swatch tool to change the direction of a gradient and to change the gradient's beginning point and end point. You'll now use the Gradient Swatch tool to apply a gradient across multiple objects in the six diamond shapes at the bottom of the page. You will then view the final layout in Presentation mode.

1. Using the Zoom tool ( ), zoom in on the diamond shapes below the "Paris • Madrid • New York" text.
2. Using the Selection tool ( ), click to select the group that includes the six diamond shapes and the line behind them.



Now you'll apply the Green/White Gradient to the six different diamond objects.

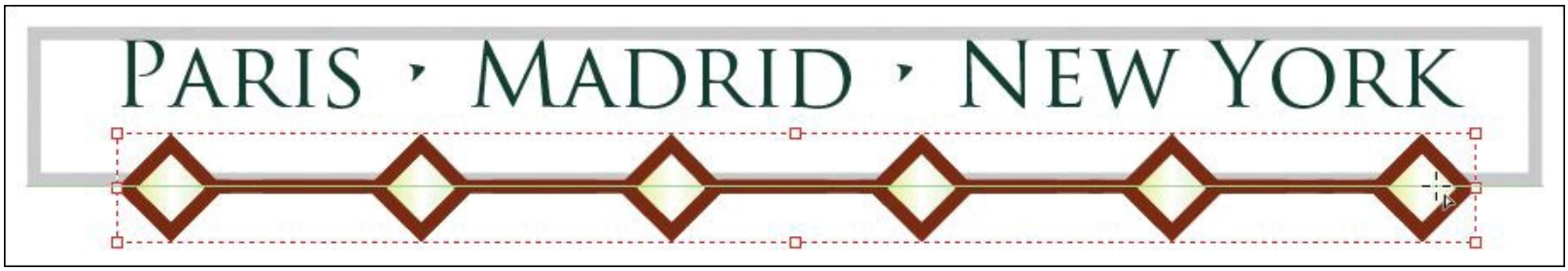
3. Confirm that the Fill box ( ) is selected in the Swatches panel.
4. At the bottom of the Tools panel, click and hold down the Apply Color button, then choose Apply Gradient from the menu to apply the last selected gradient.



Notice that the gradient affects each object on an individual basis. (If necessary, zoom in to view the color and gradient.) Now you'll use the Gradient Swatch tool to apply the gradient across the six selected objects as one.

5. With the six objects still selected, select the Gradient Swatch tool ( ) in the Tools panel.
6. Drag a line across the objects, starting from the leftmost object and releasing the mouse at the end of the rightmost object.

Now the gradient runs across all six selected objects.



7. Choose Edit > Deselect All, then choose File > Save.

Now you will review the document in Presentation mode, during which InDesign is hidden entirely and the document fills the entire screen.

Tip

Presentation mode works well for presenting design ideas to clients on a laptop. You can navigate the pages of the layout using the arrow keys on your keyboard.

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8. Click and hold down the Mode button ( ) at the bottom of the Tools panel and choose Presentation ( ). When you're finished viewing the document, press the Escape key.

Exploring on your own

Follow these steps to learn more about importing colors and working with gradient swatches:

1. To create a new document, choose File > New > Document and click OK in the New Document dialog box.
2. If necessary, choose Window > Color > Swatches to open the Swatches panel.
3. Choose New Color Swatch from the Swatches panel menu ( ).
4. In the Color Mode menu, select Other Library and browse to find the Lesson08 folder.
5. Double-click 08_End.indd. Notice that the colors you created earlier in this lesson appear in the New Color Swatch dialog box.
6. Select Brown/Tan Gradient and click Add.

Tip

In addition to importing selected colors from another document, you can quickly import all colors from another document. To do this, choose Load Swatches from the Swatches panel menu.

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7. Select any other swatches you wish, and click Add to load the colors into the new document.
8. Click Done when you're finished adding colors.
9. Use the frame tools to create several rectangles and ovals, then experiment with the Gradient Swatch tool. Notice the difference in the gradients when you drag shorter and longer distances.
10. Double-click the color swatch [Paper] and change its color values. For a more realistic preview, the page color changes to reflect the color of the paper on which the document will be reproduced.

Review questions

1. What is the advantage of creating colors in the Swatches panel instead of the Color panel?
2. What are the three general steps involved in applying a swatch of color?
3. What are the pros and cons of using spot colors versus process colors?
4. After you create a gradient and apply it to an object, how do you adjust the direction of the gradient blend?

Review answers

1. If you use the Swatches panel to apply a color to text and objects, and then decide you want to use a different color, you don't need to update each use of the color individually. Instead, change the color's definition in the Swatches panel, and the color changes automatically throughout the layout.
2. The three general steps to applying a color swatch are: (1) selecting the text or object, (2) selecting the stroke or fill box, depending on what you want to change, and (3) selecting the color. You can access color swatches in the Swatches panel and the Control panel. The Tools panel provides quick access to the last color applied as well.
3. By using a spot color, you can ensure color accuracy. However, each spot color requires its own plate on the press, so using spot colors can be more costly. Use process colors when a job requires so many colors that using individual spot inks would be expensive or impractical, such as when printing color photographs.
4. To adjust the direction of the gradient blend, use the Gradient Swatch tool to repaint the fill along an imaginary line in the direction you want.

9. Working with Styles

Lesson Overview

In this lesson, you'll learn how to do the following:

- Create and apply paragraph styles.
- Create and apply character styles.
- Nest character styles inside paragraph styles.
- Create and apply object styles.
- Create and apply cell styles.
- Create and apply table styles.
- Globally update paragraph, character, object, cell, and table styles.
- Import and apply styles from other InDesign documents.
- Create style groups.

This lesson will take about 1 hour to complete.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the "Getting Started" section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.

With Adobe InDesign, you can create styles—sets of formatting attributes—and apply them in one step to text, objects, tables, and more. Any changes to a style automatically affect all of the text or objects to which the style is applied. Styles offer a quick, consistent method for formatting layouts.

Getting started

In this lesson, you'll create and apply styles for a few pages of a catalog for the Expedition Tea Company. Styles are collections of attributes that allow you to consistently apply formatting across documents in one step. (For example, a Body Text paragraph style specifies attributes such as font, size, leading, and alignment.) The catalog pages here contain text, tables, and objects that you will format and then use as the basis for creating styles. Later, if you were to place more catalog content, you could format the new text, tables, and objects with one click using styles.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

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1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.
2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced.

   To begin working, you'll open an existing InDesign document.
3. Choose File > Open, and open the 09_Start.indd file, in the Lesson09 folder, located inside the Lessons folder within the InDesignCIB folder on your hard disk. If the Missing Fonts dialog box displays, click Sync Fonts.
4. Choose File > Save As, rename the file **09_Styles.indd**, and save it in the Lesson09 folder. Scroll to view all the pages.
5. To display the document at a higher resolution, choose View > Display Performance > High Quality Display.
6. If you want to see what the finished document will look like, open the 09_End.indd file in the same folder. You can leave this document open to act as a guide as you work. When you're ready to resume working on the lesson document, click its tab in the upper-left corner of the document window.

Tea Gift Collections

Our gorgeous tea collections are packaged in golden tins within an EXPEDITION TEA COMPANY keepsake wooden box with a leather handle and brass fittings. Give it as a gift to your favorite tea lover or to yourself!

Teapots and Tea Accessories

EXPEDITION TEA COMPANY carries a unique collection of modern and traditional teapots, chosen to satisfy many tastes including glass, ceramic, cast-iron, stainless, and silver. Our tea timers, tea bags, tea strainers, scoops and other tea things will make your tea time perfect. The four main categories of tea include: white, green, oolong, black—classified by the way the leaves are processed. Within these four categories, there are myriad variations with fancy names, shapes, flavors, and aromas.

TEA	FINISHED LEAF	COLOR	BREWING DETAILS
White	Soft, grayish white	Pale yellow or pinkish	165° for 5-7 min.
Green	Dull to brilliant green	Green or yellowish	180° for 2-4 min.
Oolong	Blackish or greenish	Green to brownish	212° for 5-7 min.
Black	Lustrous black	Rich red or brownish	212° for 3-5 min.

EXPEDITION TEA COMPANY

Understanding styles

InDesign provides styles for automating nearly all text and object formatting. Creating, applying, modifying, and sharing styles works the same way for all types of styles: paragraph, character, object, table, and cell styles. A few notes about styles:

Basic styles

The default formatting of everything in a new InDesign document is determined by its

respective “basic” style. For example, when you create a new text frame, its formatting is determined by the [Basic Text Frame] object style. Therefore, if you wanted to specify that all new text frames have a 1-pt stroke, you would modify [Basic Text Frame]. To create a new default for all new InDesign documents, modify the “basic” style when no documents are open. Whenever you ever find yourself repeating a formatting task, stop and think about whether it makes sense to modify the relevant basic style or create a new style.

Applying styles

Applying a style is as simple as making a selection and then clicking a style name in the relevant Styles panel. For example, to format a table, you select the table (Table > Select > Table), and then click a style name in the Table Styles panel. If you are working with an extended keyboard, you can set up keyboard shortcuts for applying styles as well.

Tip

Keyboard shortcuts are especially handy for formatting text. A quick way to remember shortcuts is to sync them up to the style names and usage. For example, if you create a paragraph style named “1 Headline” with the shortcut Shift+1, it’s easy to remember the shortcut because it’s often the first style you apply.

Overriding manual formatting with styles

In many cases, you will want an object, a table, or some text to match a style’s specifications precisely. To do this, you need to override any manual formatting. If a selection does not precisely match its style, a plus sign appears next to the style name. To see how the formatting varies from the style, point at the style name in the Styles panel; a tool tip describes the overrides applied. Each Styles panel has a Clear Overrides control at the bottom, indicated by an icon and a plus sign. Move your mouse over the icon to learn how to clear overrides in the selection. (Note that if you are having trouble clearing overrides while applying a paragraph style, check to see if a character style is applied to the text.)

Modifying and redefining styles

A primary benefit of using styles is the ability to apply formatting consistently and quickly make global changes. To modify a style, double-click its name in a Styles panel to display its Options dialog box. You can also modify text, table, or object formatting manually and then choose Redefine Style from the Styles panel menu.

Sharing styles

All the Styles panel menus provide a Load option for importing styles from other InDesign documents. When you copy and paste from other documents, those elements bring their styles with them as well.

Creating and applying paragraph styles

Paragraph styles let you apply and globally update text formatting to speed up production and create a more consistent overall design. Paragraph styles incorporate all elements of text formatting, including character attributes such as font, size, style, and color, along with paragraph attributes such as indents, alignment, tabs, and hyphenation. They differ from character styles in that they are applied to

entire paragraphs at once, not just to selected characters.

Tip

When working on longer documents, such as books and catalogs, using styles can save hours of time in manual formatting. A common way to get started is to select all the text in a document and apply a "body text" paragraph style with one click. You can then go through the text and apply heading paragraph styles and character styles with keyboard shortcuts.

Creating a paragraph style

In this exercise, you'll create and apply a paragraph style to selected paragraphs. First, you will format the text in the document locally (that is, not based on a style). Then, you will have InDesign pick up this existing formatting and build it into a new paragraph style.

1. Choose Layout > Next Page to display page 2 of 09_Styles.indd in the document window. Adjust the view scale so you can easily see the text.
2. Using the Type tool (T), drag to select the "Loose Leaf Teas" subhead, which follows the introductory paragraph on page 2.

Tip

The easiest way to create a paragraph style is to format a sample paragraph using local (not style-based) formatting, and then create a new style based on that sample paragraph. Effectively, this lets you see the style before you build it. You can then efficiently use the new style in the rest of the document.

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3. If necessary, click the Character Formatting Controls icon (A) in the Control panel. Specify the following:
   - Type Style: Semibold
   - Size: 18 pt

   Leave all other settings at their defaults.

4. In the Control panel, click Paragraph Formatting Controls (¶), and increase the Space Before

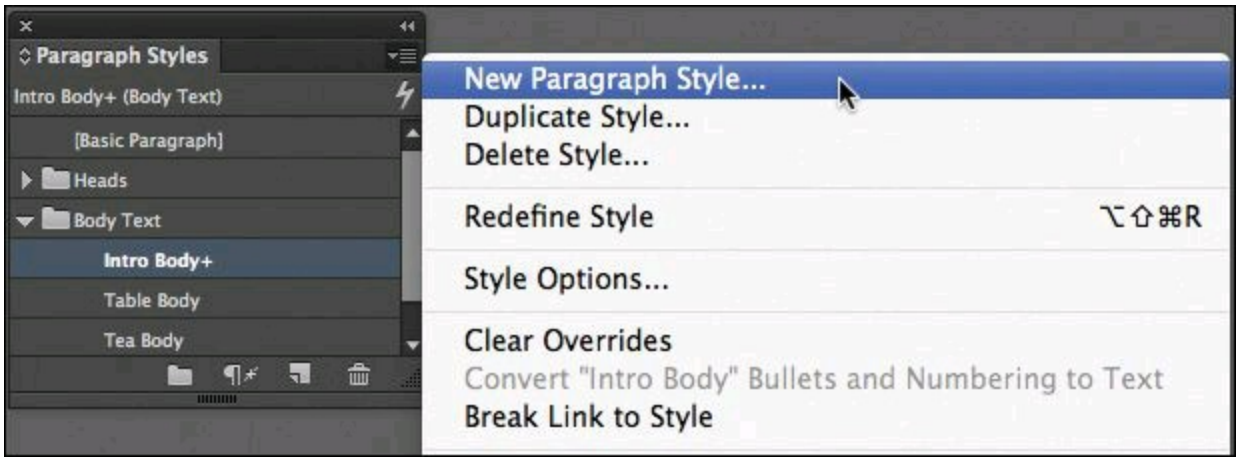
(▤) to **p3**.

Now you'll create a paragraph style using this formatting so that you can use it to format the other subheads in the document.

5. Make sure that the text insertion point is still in the text you just formatted. If it's not already visible, open the Paragraph Styles panel by choosing Type > Paragraph Styles.

   The Paragraph Styles panel already has a few styles provided for you, including the default, [Basic Paragraph].

6. In the Paragraph Styles panel, create a new paragraph style by choosing New Paragraph Style from the panel menu. The New Paragraph Style dialog box opens, displaying the formatting you just applied to the subhead in the Style Settings section.



Tip

If you change the Based On style—for example, by changing the font—the changes update all styles based on that style. Unique characteristics of styles based on other styles are maintained. Basing styles on other styles is helpful when creating a series of related styles, such as Body Copy, Bulleted Copy, and so on. If the font of the Body Copy style changes, all related styles will have the font updated as well.

In the New Paragraph Style dialog box, notice that the new style is based on the Intro Body style. Since Intro Body was applied to the subhead when you created the style, the new style is automatically based on Intro Body. By using the Based On option in the General section of the New Paragraph Style dialog box, you can use an existing style as a starting point for a new style.

7. In the Style Name box at the top of the dialog box, type **Head 2** to name this style as the second largest headline.

   To speed up text formatting while typing in InDesign, you can specify a Next Style for a paragraph style. Each time you press Enter or Return, InDesign automatically applies the Next Style. For example, your headline style might automatically be followed by your body paragraph style.

8. Select Intro Body from the Next Style menu, because this is the style used for the text following each Head 2 headline.

   You can also create keyboard shortcuts for easily applying styles in InDesign.

Note

If your keyboard lacks a numeric keypad, you can skip this step.

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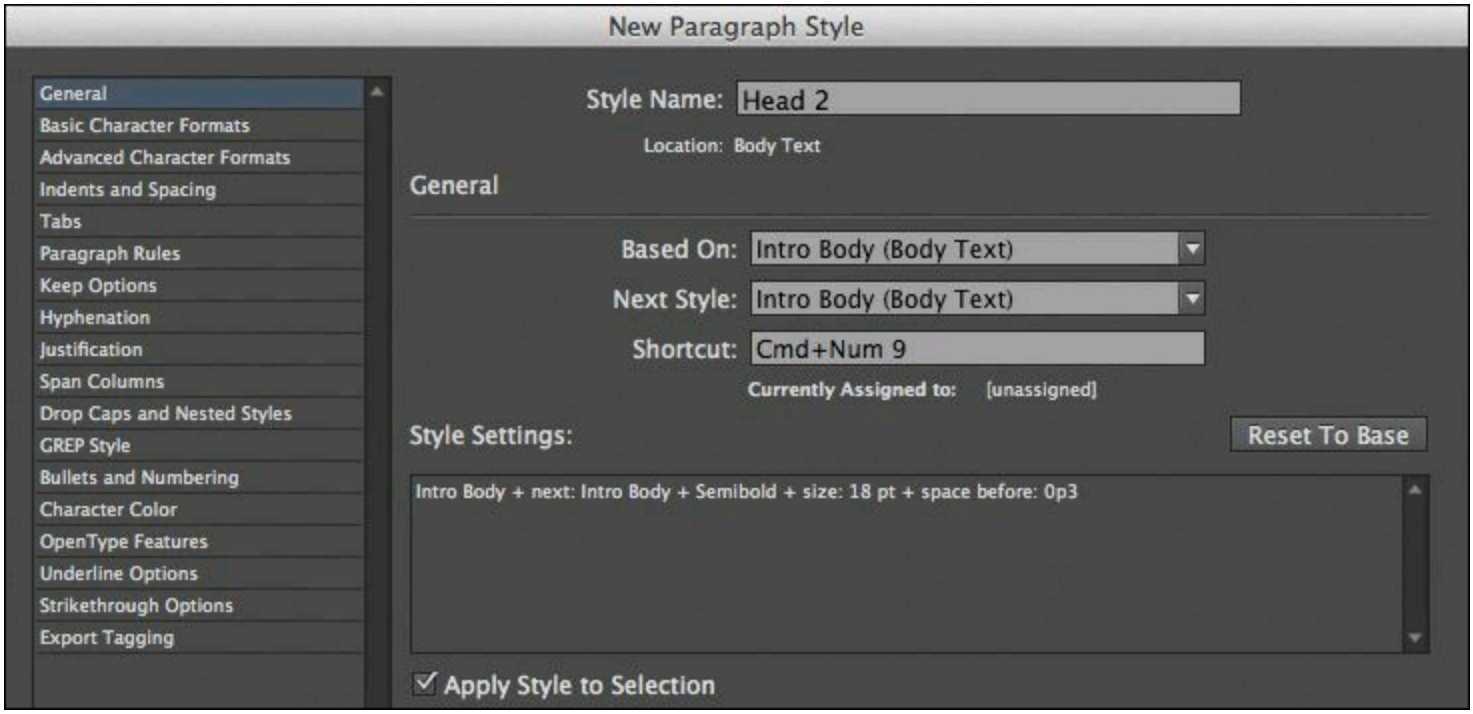
9. Click in the Shortcut box, hold down Shift (Windows) or Command (Mac OS), and press 9 on the numeric keypad of your keyboard. (InDesign requires the use of a modifier key for style shortcuts.) Note that in Windows the Num Lock key on the keypad must be down to create or apply style shortcuts.
10. Select Apply Style To Selection to apply this new style to the text you just formatted.

Tip

If you don't select Apply Style To Selection, the new style appears in your Paragraph Styles panel, but it is not automatically applied to the selected text you used to create the style.



11. Click OK to close the New Paragraph Style dialog box.

    The new Head 2 style appears in the Paragraph Styles panel and is highlighted to indicate that it's applied to the selected paragraph.
12. In the Paragraph Styles panel, click the arrow next to the Heads style group to open it. Then, drag the Head 2 style up between Head 1 and Head 3.
13. Choose Edit > Deselect All, then choose File > Save.

Applying a paragraph style

Now you'll apply your paragraph style to other paragraphs in the document.

1. If necessary, scroll to the right to see the right-facing page of the spread.
2. Using the Type tool (T), click to place an insertion point anywhere within "Tea Gift Collections."

Note

You can use the keyboard shortcut you defined earlier (Shift+9 or Command+9) to apply the Head 2 style as well. To apply styles in Windows, be sure the Num Lock key on the keypad is down.

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3. Click once on the Head 2 style in the Paragraph Styles panel to apply the style to the paragraph. The text attributes change to reflect the paragraph style.
4. Repeat steps 2 and 3 to apply the Head 2 style to "Teapots and Tea Accessories" on page 3.

5. Choose Edit > Deselect All, then choose File > Save.

Creating and applying character styles

In the previous exercise, paragraph styles allowed you to apply character and paragraph formatting to text with a single click or a keystroke. Similarly, character styles are a way to apply multiple attributes—such as font, size, and color—to text using a single action. Unlike paragraph styles, which format the entire paragraph, character styles apply formatting to selected characters such as a word or phrase.

Tip

Character styles are helpful for lead-in characters such as bullets, numbers in numbered lists, and drop caps. They are also useful for emphasizing text within body copy—for example, the names of stocks are often in bold and small caps.

Creating a character style

Now you will create and apply a character style to selected text in the document. This demonstrates how character styles can make your work more efficient and consistent.

1. On page 2, scroll to view the first paragraph.
2. If it's not already visible, open the Character Styles panel by choosing Type > Character

Styles.

The only style listed in this panel is the default, [None].

As you did with the paragraph style in the previous section, you'll build a character style based on existing text formatting. This approach lets you see the formatting before you create the style. In this case, you'll format the Expedition Tea Company name and build it into a character style, so that it can be reused efficiently throughout the document.

3. Using the Type tool (T), select the words "Expedition Tea Company" on page 2.
4. In the Control panel, click Character Formatting Controls (A).
5. From the Font Style menu, choose Semibold, and then click Small Caps (Tт).

Now that the text is formatted, you'll create a new character style.

6. Click Create New Style at the bottom of the Character Styles panel.

7. Double-click the new Character Style 1 that displays in the Character Styles panel. The Character Style Options dialog box opens.
8. In the Style Name box at the top of the dialog box, type **Company Name** to define the style's purpose.

   As you did for the paragraph style you created, now you'll create a keyboard shortcut for easy application of this style.

Note

If your keyboard lacks a numeric keypad, you can skip this step.

---

9. Click in the Shortcut box, hold down Shift (Windows) or Command (Mac OS), and press 8 on the numeric keypad of your keyboard. In Windows, be sure that the Num Lock key on the keypad is down.
10. Click Basic Character Formats in the list at the left to see what the character style includes.

Tip

Character styles only include differences, such as All Caps, from the attributes specified in the paragraph style. You can apply this character style to text formatted with any paragraph style, with any character attributes, and All Caps will be applied. This means you can have a single character style for Bold text, for example.

11. Click OK to close the Character Style Options dialog box. The new Company Name style appears in the Character Styles panel.
12. Choose Edit > Deselect All, then choose File > Save.

Applying a character style

You're ready to apply your character style to selected text already placed in the document. As with paragraph styles, using character styles prevents you from having to manually apply multiple type attributes to each instance of text.

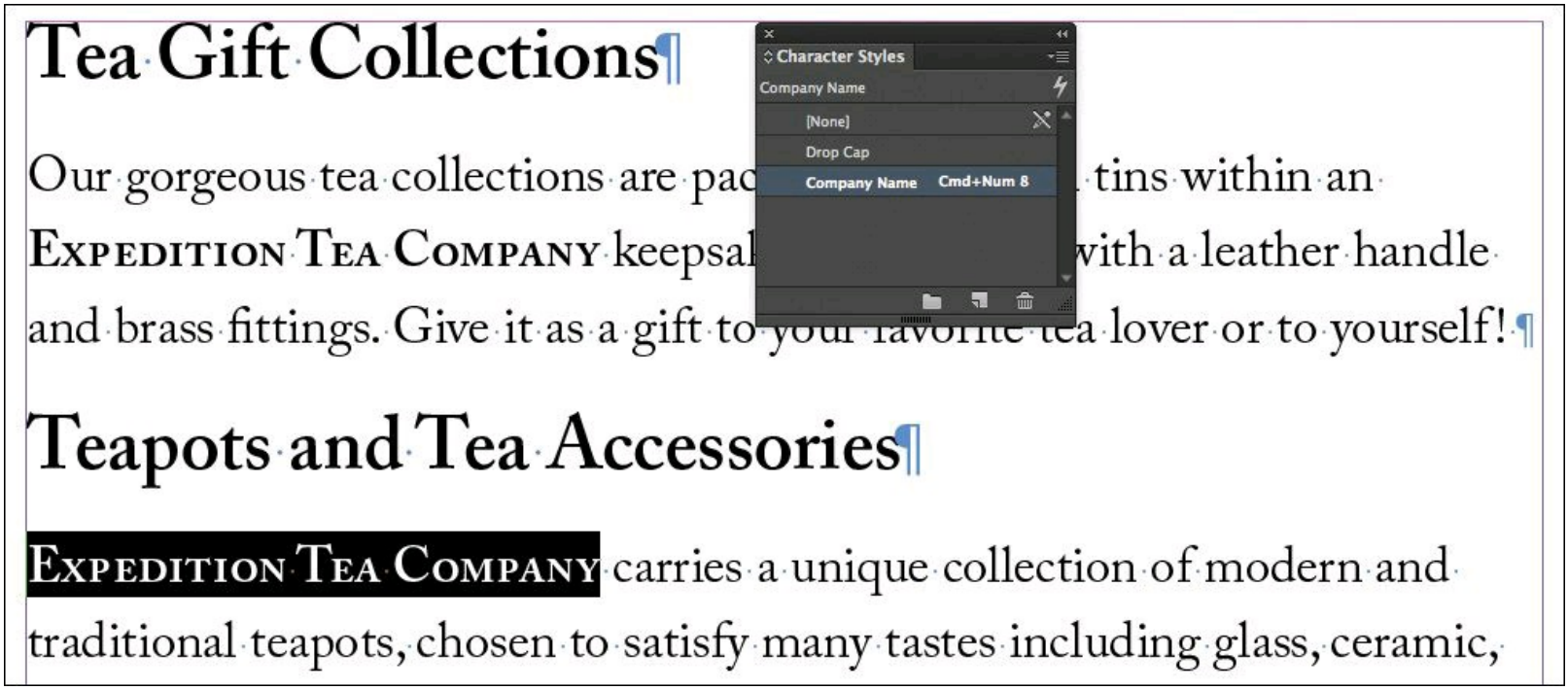
1. Scroll to the right to view the right-facing page of the first spread.

   To maintain a consistent look for the company name, you'll apply the Company Name character style.
2. Using the Type tool (T), select the words "Expedition Tea Company" in the first paragraph of body text.

Note

You can also use the keyboard shortcut you defined earlier (Shift+8 or Command+8) to apply the Company Name style.

3. In the Character Styles panel, click once on the Company Name style to apply it to this text. You should see the text change to reflect the character style you created.
4. Using either the Character Styles panel or the keyboard shortcut, apply the Company Name style to the words "Expedition Tea Company" in the second body paragraph as well.

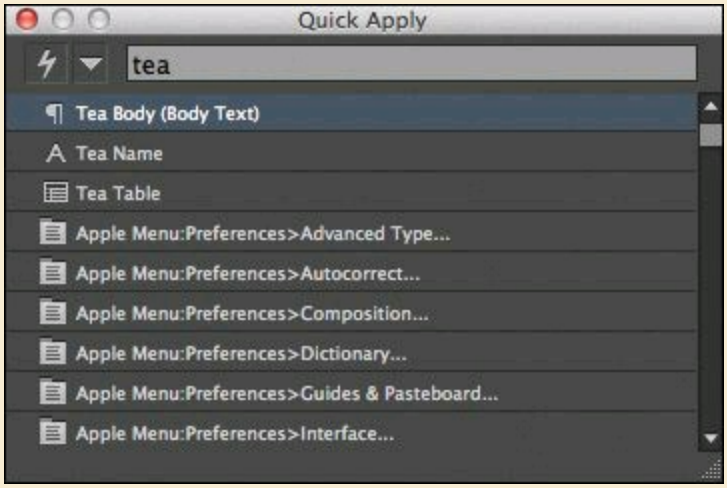


Leave the Character Styles panel open for the next exercise.

5. Choose Edit > Deselect All, then choose File > Save.

Applying Styles with Quick Apply

A quick way to apply styles without lifting your hands from the keyboard is using Quick Apply. To use it, press Ctrl+Enter (Windows) or Command+Return (Mac OS). In the Quick Apply dialog box, start typing the name of the style until it's recognized. Use the arrows keys to select it in the list, then press Enter (Windows) or Return (Mac OS). You can also choose Edit > Quick Apply to display the Quick Apply dialog box.



Nesting character styles inside paragraph styles

To make the use of styles more convenient and powerful, InDesign lets you nest character styles within paragraph styles. These nested styles allow you to apply distinct character formatting to specific portions of a paragraph—such as the first character, the second word, or the first line—at the same time you apply a paragraph style. This makes nested styles ideal for creating run-in headings, where the first portion of a line or paragraph is styled differently from the rest of the line or paragraph. In fact, anytime you can define a pattern of formatting within a paragraph, such as applying

italic type style until reaching the first period, you can probably automate the formatting with a nested style.

Tip

You can use the incredibly powerful nested styles feature to automatically apply different formatting within a paragraph according to a specific pattern. For example, in a table of contents, you can automatically apply bold to the text, change the tracking in the tab leader (the dots that lead to the page number), and change the font and color of the page number.

Creating character styles for nesting

To create a nested style, you need to first create both a character style and a paragraph style in which to nest it. In this section, you'll create two character styles for nesting, and then nest them within the paragraph style Tea Body, which already exists.

1. Double-click page 4 in the Pages panel, then choose View > Fit Page In Window.

   If the body copy is too small to view, zoom in to the first paragraph under the "Black Tea" heading, beginning with "Earl Grey." In this exercise, you'll create two nested styles to distinguish the tea name from the country where it was grown. Notice that a set of colons (::) separates the name and country, and a bullet (•) appears after the region. These characters will be important when creating your nested styles later in this section.

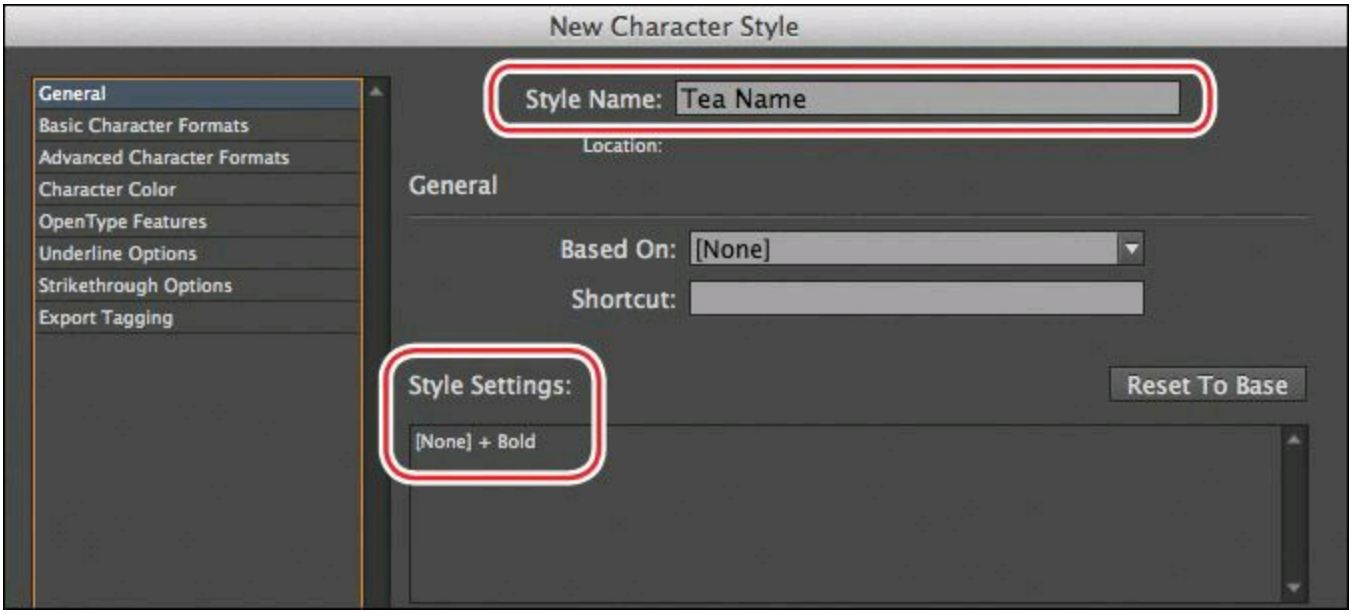
2. Using the Type tool (T), select the words "Earl Grey" in the first column.

3. If necessary, click the Character Formatting Controls icon (A) in the Control panel. Choose Bold from the Type Style menu. Leave all other settings at their defaults.

   Formatting text by specifying options in the Control, Paragraph, and Character panels—rather than by applying styles—is called local formatting. This locally formatted text is now ready to serve as the basis for a new character style.

4. In the Character Styles panel, choose New Character Style from the panel menu. The New Character Style dialog box opens, displaying the formatting you applied.

5. In the Style Name box at the top of the dialog box, type **Tea Name** to define the text to which the style will be applied.



To make the tea name stand out a little more, you'll change the color from black to burgundy.

6. From the categories on the left side of the dialog box, choose Character Color.

7. In the Character Color settings that appear on the right side of the dialog box, select the burgundy color swatch (C = 43, M = 100, Y = 100, K = 30).

8. Click OK to close the New Character Style dialog box. You should see the new Tea Name style appear in the Character Styles panel.

Now you'll create a second character style for nesting.

9. To the right of the "Earl Grey" text you just formatted, select the text "Sri Lanka." Using the Character panel (Type menu) or the Control panel, change the Font Style to Italic.

10. Repeat steps 4 and 5 to create a new character style called Country Name. When finished, click OK to close the New Character Style dialog box. The new Country Name style appears in the Character Styles panel.

11. Choose Edit > Deselect All, then choose File > Save.

You have created two new character styles. Using these along with the existing Tea Body paragraph style, you are ready to create and apply your nested style.

Creating a nested style

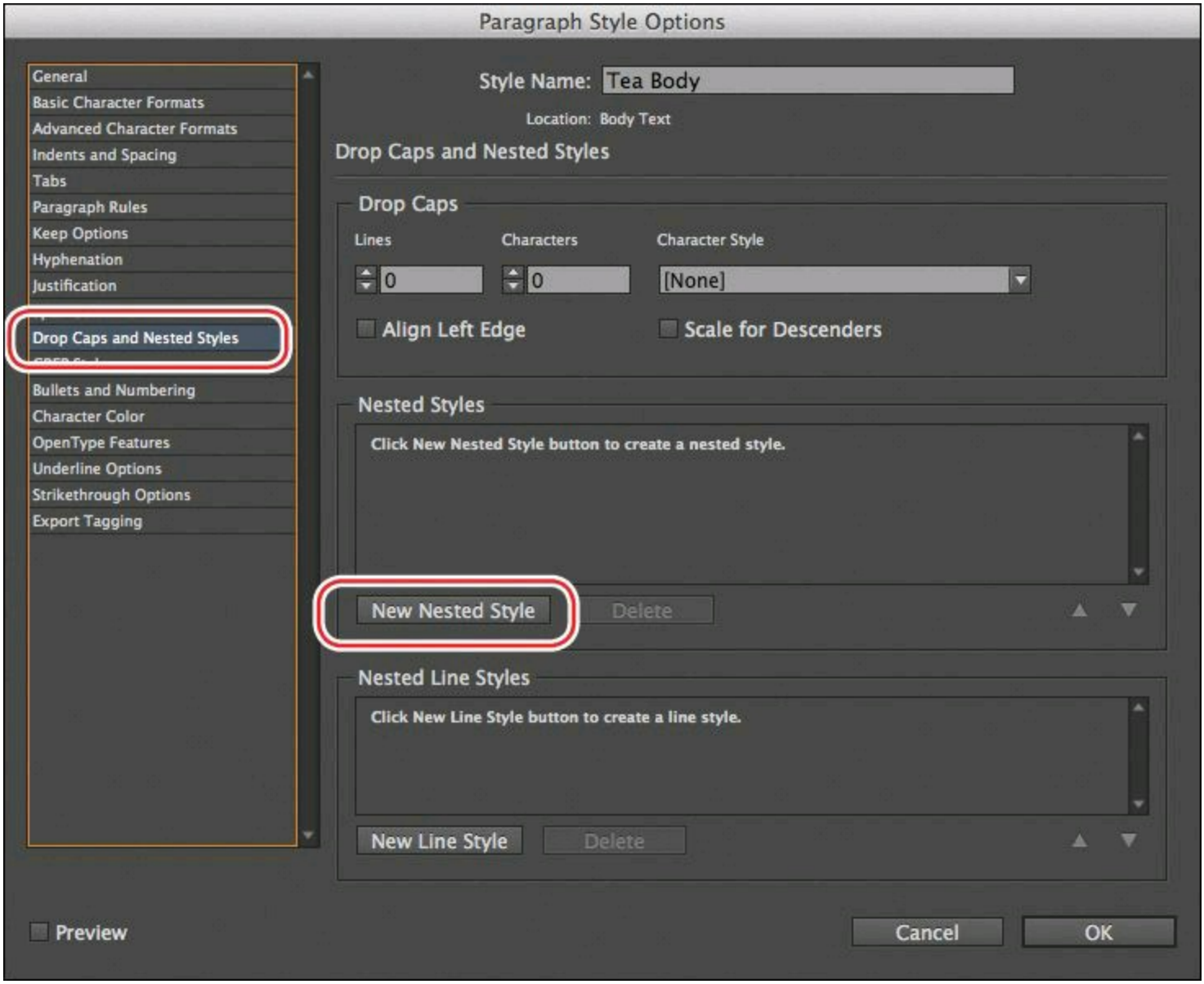
When you create a nested style within an existing paragraph style, you're basically specifying a secondary set of rules for InDesign to follow while formatting a paragraph. In this exercise, you'll build a nested style into the Tea Body style using one of the two character styles you created in the previous exercise.

Tip

In addition to nested styles, InDesign provides nested line styles. These let you specify formatting for individual lines in a paragraph—such as a drop cap followed by small caps, which is common in the lead paragraphs of magazine articles. If the text reflows, InDesign adjusts the formatting to encompass only the specified lines. The controls for creating nested line styles are in the Drop Caps And Nested Styles panel of the Paragraph Style Options dialog box.

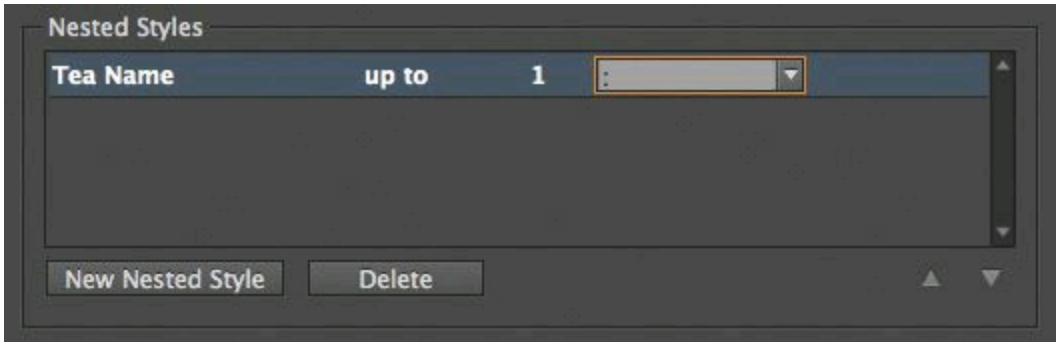
---

1. If necessary, position page 4 in the center of the document window.
2. If the Paragraph Styles panel is not visible, choose Type > Paragraph Styles.
3. In the Paragraph Styles panel, double-click the Tea Body style to open the Paragraph Style Options dialog box.
4. From the categories on the left side of the dialog box, select Drop Caps And Nested Styles.
5. In the Nested Styles section, click the New Nested Style button to create a new nested style.



A nested style that applies the [None] character style through 1 Word appears.

6. Click the [None] style to display a menu. Select the Tea Name character style; this is the first nested style in the sequence.
7. Click the word "through" to reveal another menu. This menu contains only two choices: Through and Up To. The Tea Name character style needs to be applied up to the first colon (:) after Earl Grey, so select Up To.
8. Click the number 1 next to Up To to activate a text box into which you can type a number. The number defines how many elements the style applies through or up to. Although there are two colons, you only need to reference the first colon, so leave this as the default, 1.
9. Click Words to reveal another text box and menu. Click the menu button to the right of the box to view elements to which the style can be applied, including sentences, characters, and spaces. Select and delete the word "Words," and then type a colon (**:**) in the box.



10. In the lower-left corner, select Preview and move the Paragraph Style Options dialog box so that you can see the columns of text. The name for each tea should be bold and burgundy up to (but not including) the first colon. Click OK.
11. Choose Edit > Deselect All, then choose File > Save.

Adding a second nested style

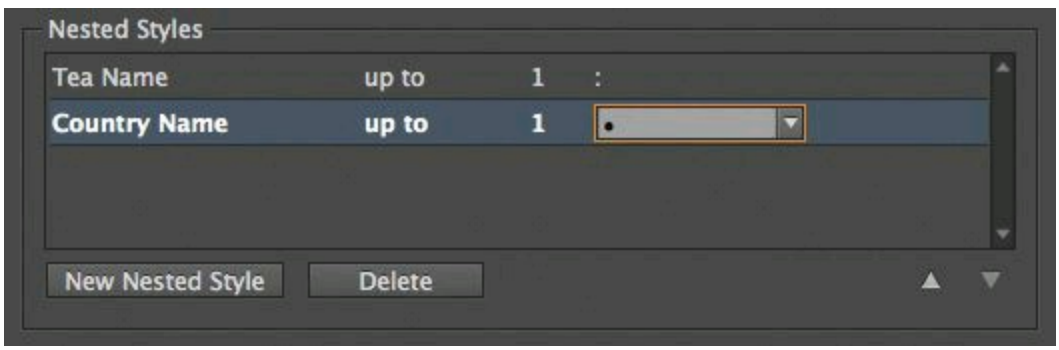
Now you'll add another nested style, but first you need to copy a bullet character from the page. Within the nested style you are creating, the formatting switch takes place up until a bullet character is encountered—but you cannot always type a bullet within a dialog box, so you may need to paste it.

Note

On a Mac, you can copy and paste the bullet or you can press Option+8 to insert a bullet in the field.

---

1. In the first column under "Black Tea," navigate to the bullet character after "Sri Lanka." Select it and choose Edit > Copy.
2. In the Paragraph Styles panel, double-click the Tea Body style. In the Drop Caps And Nested Styles section of the Paragraph Style Options dialog box, click the New Nested Style button to create another new nested style.
3. Repeat steps 6 through 9 of "Creating a nested style" to set up your new nested style with the following formatting:
   - First option: Choose Country Name.
   - Second option: Choose Up To.
   - Third option: Leave as the default, 1.
   - Fourth option: Select and delete "Words" and enter the bullet character by pasting the bullet you copied (Edit > Paste).



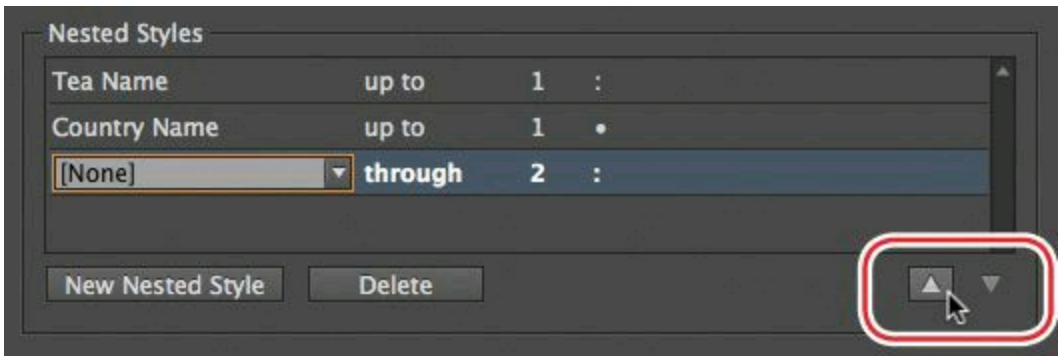
4. If necessary, select Preview in the lower-left corner. Drag the Paragraph Style Options dialog

box out of the way so you can see that each country name is italicized. Notice that the two colons between the tea name and country are also italicized—formatting not specified in the design.

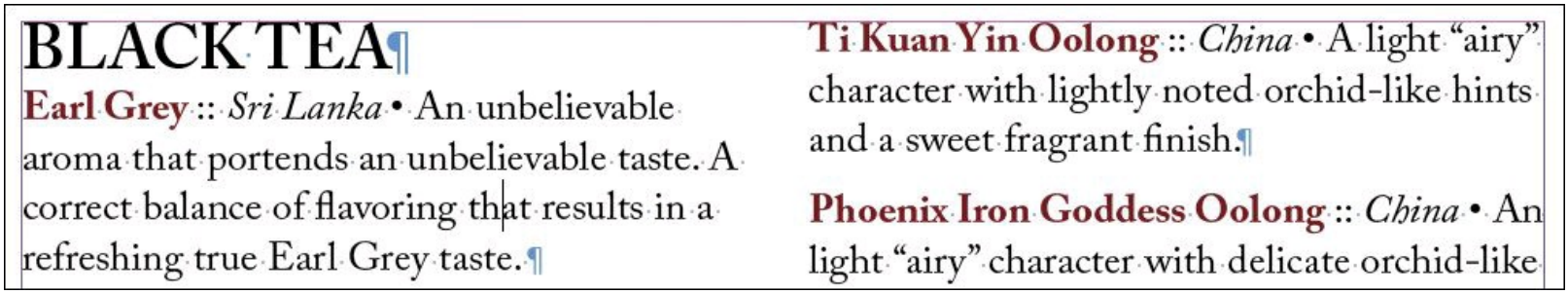
To fix the italicized colons, you'll create another nested style that applies [None] to the colons.

5. Click the New Nested Style button to create another nested style.
6. Repeat steps 6 through 9 of "Creating a nested style" to set up your new nested style with the following formatting:
   - First option: Choose [None].
   - Second option: Choose Through.
   - Third option: Type **2**.
   - Fourth option: Type **:** [colon].

   You now have a third nested style, but it needs to be placed between the Tea Name and Country Name nested styles to be in the proper position sequentially.
7. With the [None] nested style selected, click the Up Arrow button once to move the style between the other two.



8. Click OK to accept these changes. You have now finished creating a series of nested styles that apply the Tea Name and Country Name character styles to any paragraph styled with the Tea Body paragraph style.


BLACK TEA¶

Earl Grey :: *Sri Lanka* • An unbelievable aroma that portends an unbelievable taste. A correct balance of flavoring that results in a refreshing true Earl Grey taste.¶

Ti Kuan Yin Oolong :: *China* • A light "airy" character with lightly noted orchid-like hints and a sweet fragrant finish.¶

Phoenix Iron Goddess Oolong :: *China* • An light "airy" character with delicate orchid-like

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Tip

As you can see, using nested styles automated some very tedious formatting. When making style decisions for longer documents, think about establishing a pattern that will enable automatic formatting through nested styles.

---

9. Choose Edit > Deselect All, then choose File > Save.

Creating and applying object styles

Object styles let you apply and globally update formatting to graphics and frames. Combining formatting attributes—including fill, stroke, transparency, and text wrap options—into object styles helps create a more consistent overall design and speed up tedious production tasks.

Tip

All of the InDesign Styles panels (Character, Object, Table, and so on) let you group similar styles in folders called style groups. To create a style group, click the Create New Style Group button, at the bottom of the panel. Click in the group's folder to name it. You can drag styles into the folder to organize them, and you can drag styles up and down in the list to organize them.

Formatting an object for a style

In this section, you will create and apply an object style to the black circles containing the "etp" symbols on the second spread of the catalog. (The "etp" stands for Ethical Tea Partnership.) You'll base the new object style on the formatting of the black circle. So you'll start by changing the circle's color and adding a drop shadow to it; then you can define the new style.

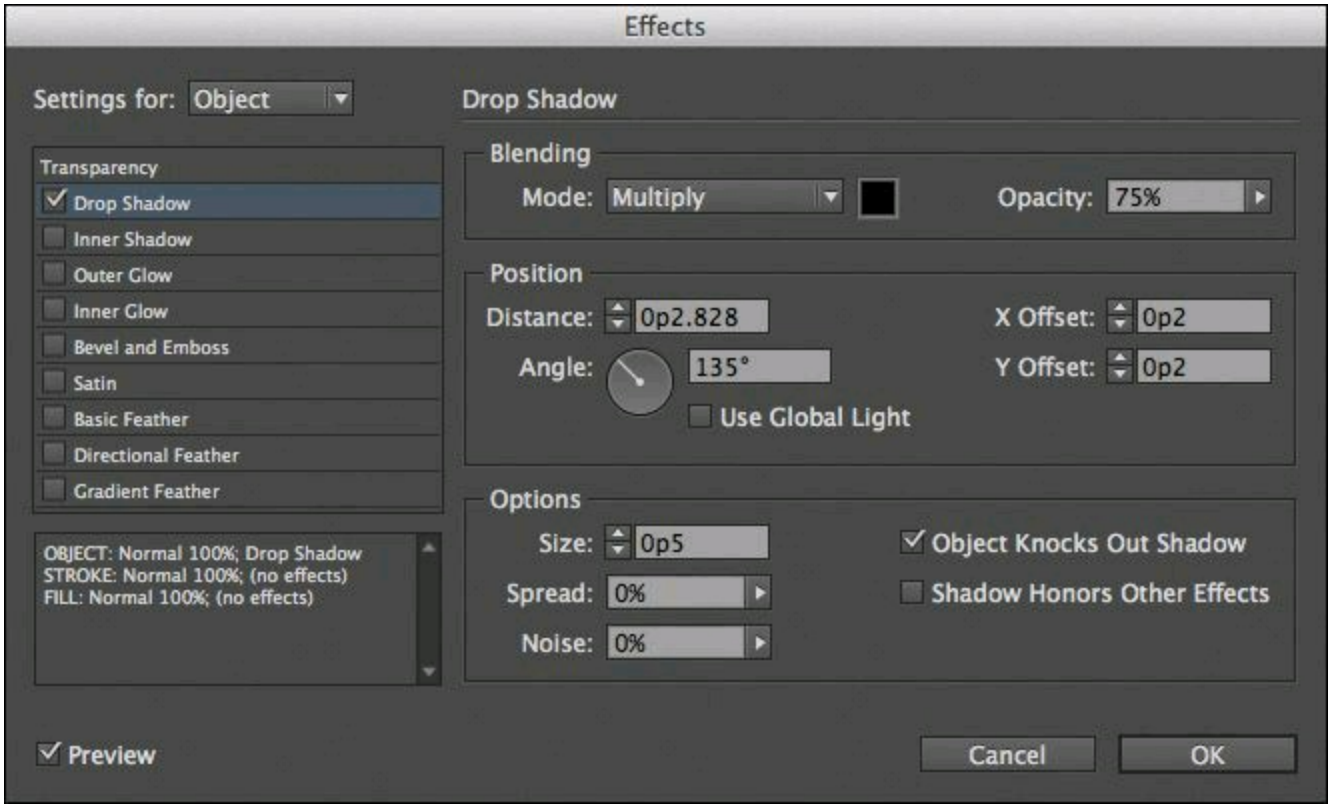
1. Double-click page 4 in the Pages panel to center the page in the document window.
2. Select the Zoom tool ( ) in the Tools panel and increase the magnification to better view the etp symbol near English Breakfast.

   To format the symbol, you will fill it with a burgundy color and apply a Drop Shadow effect. To make this task easier, the type and circle for all the etp symbols have been placed on separate layers—the type on the layer called Etp Type and the circles on a layer called Etp Circle.
3. Choose Window > Layers to view the Layers panel.
4. Click the empty box to the left of the Etp Type layer's name to display a lock icon ( ). This locks the layer so you cannot accidentally change the text while editing the object.

5. With the Selection tool ( ), click the black etp symbol next to English Breakfast.
6. Choose Window > Color > Swatches. In the Swatches panel, click the Fill button and then click the burgundy color swatch (C = 43, M = 100, Y = 100, K = 30).

7. With the etp symbol still selected, choose Object > Effects > Drop Shadow. In the Position section, decrease the X Offset and Y Offset to **p2**.

8. Select Preview to see the changes.



9. Click OK. The symbol should now have a drop shadow. Leave the symbol selected for the next exercise.

10. Choose File > Save.

Creating an object style

Now that the object is formatted properly, you are ready to create the object style from its formatting. Keep the etp symbol selected to base the new object style's formatting on it.

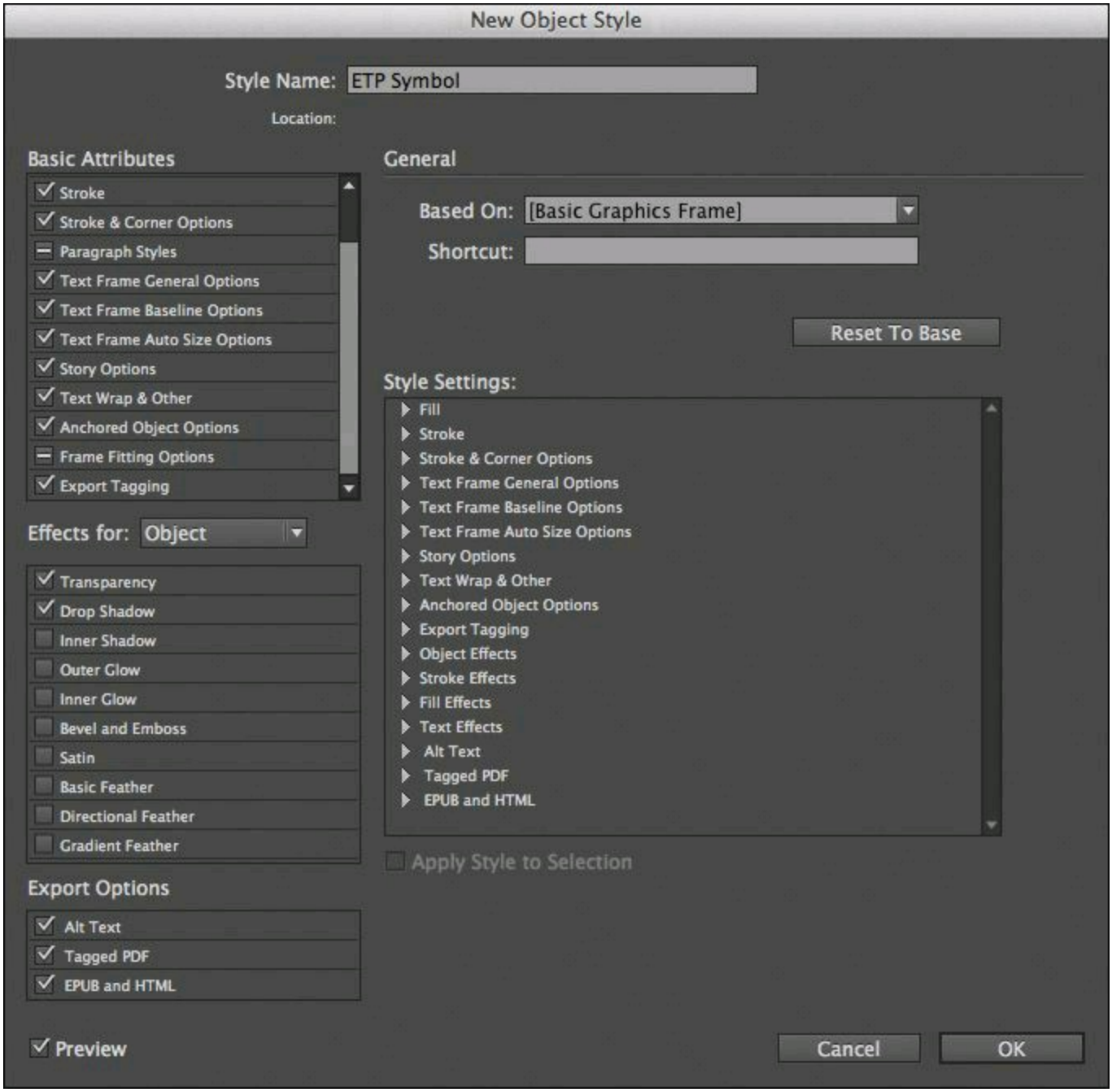
Tip

Just as with paragraph and character styles, you can base an object style on another object style. Changes made to the Based On style update all object styles based on that style. (Unique characteristics of styles based on other styles are maintained.) The controls for basing a style on another are in the General panel of the New Object Style dialog box.

1. Choose Window > Styles > Object Styles to open the Object Styles panel.
2. In the Object Styles panel, hold down the Alt (Windows) or Option (Mac OS) key while you click Create New Style in the lower-right corner.

The New Object Style dialog box opens automatically so you can fine-tune the object style settings. The selected boxes on the left side of this dialog box indicate which attributes will be applied when this style is used.

3. In the Style Name box at the top of the New Object Style dialog box, type **ETP Symbol** to describe the purpose of the style.



4. Select Apply Style To Selection, and click OK.

The new ETP Symbol style appears in the Object Styles panel.

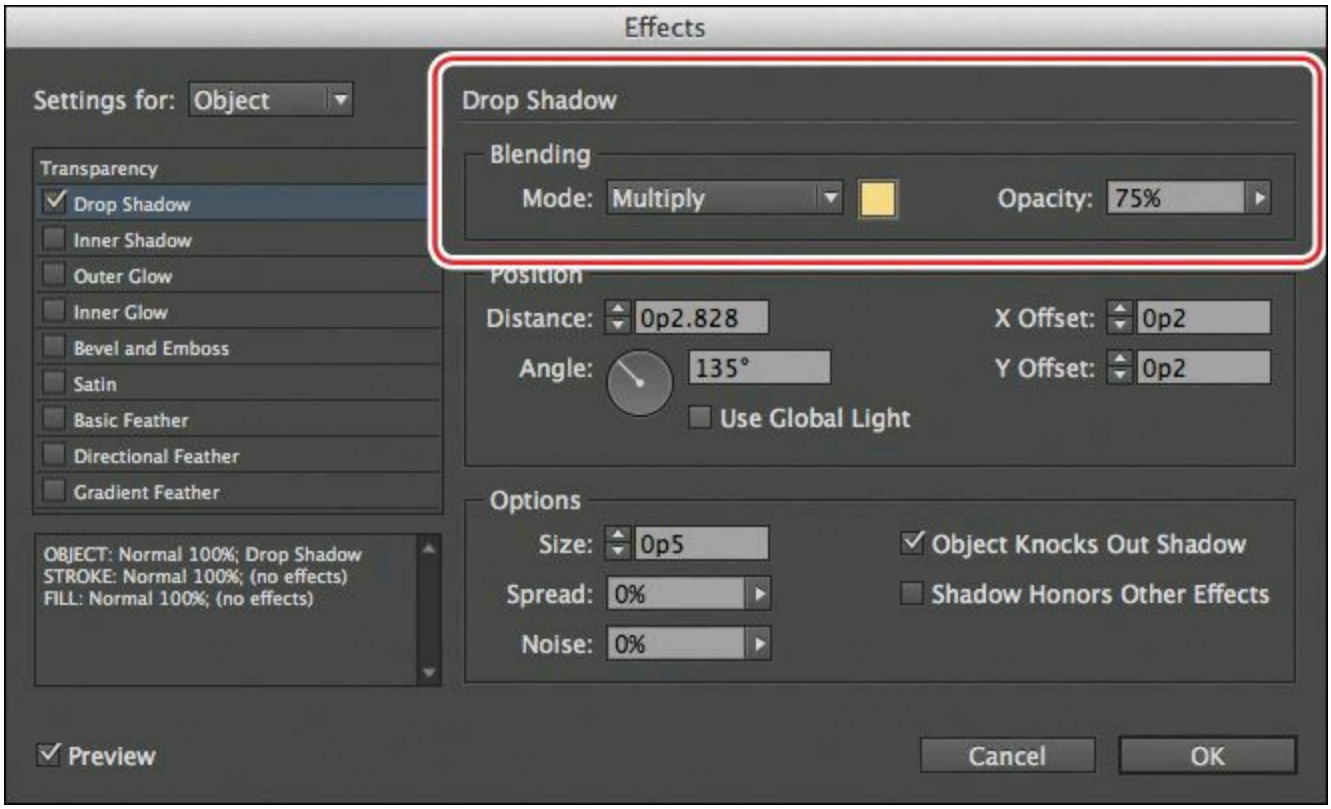
Tip

When you modify a style, the text, table, or objects to which the style is applied update automatically. If you have a specific instance of text, a table, or an object that you do not want to update, you can break its link to the style. Each styles panel (Paragraph Styles, Cell Styles, and so on) has a Break Link To Style command in the panel menu.

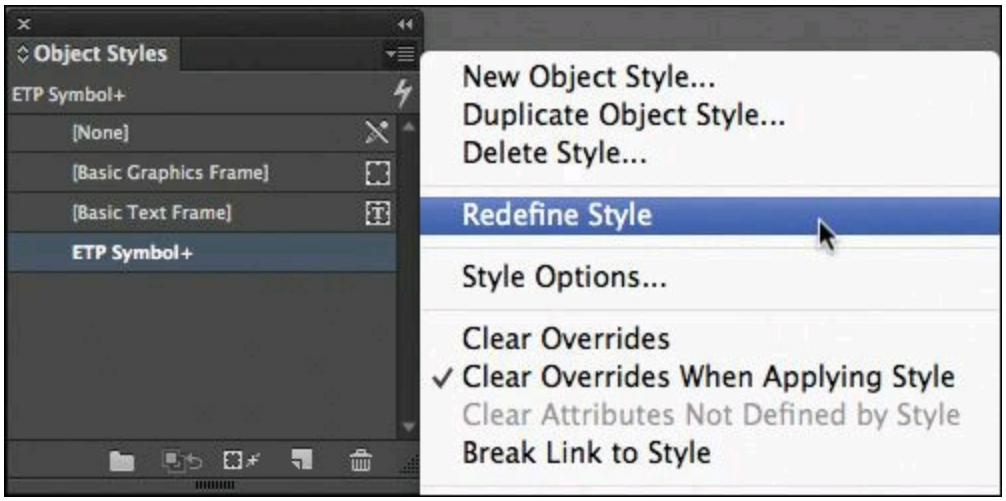
Now you'll change the color of the drop shadow and update the object style. You do not need to finalize design decisions before you create and apply styles because styles are easy to update based on new formatting.

5. With the symbol still selected, choose Object > Effects > Drop Shadow.
6. In the Blending area, click the color swatch and then choose the pale yellow (C = 4, M= 15, Y=

48, K = 0), and click OK.



7. Click OK to close the Effects dialog box.
8. Choose Redefine Style from the Object Styles panel menu. This updates the style to match the new formatting.



9. Choose Edit > Deselect All, then choose File > Save.

Applying an object style

Now you'll apply your new object style to the other circles on the second spread. Applying the object style changes the formatting of the circles automatically; you don't have to manually apply the color and drop shadow to each circle individually.

1. With pages 4 and 5 displayed, choose View > Fit Spread In Window.

Tip

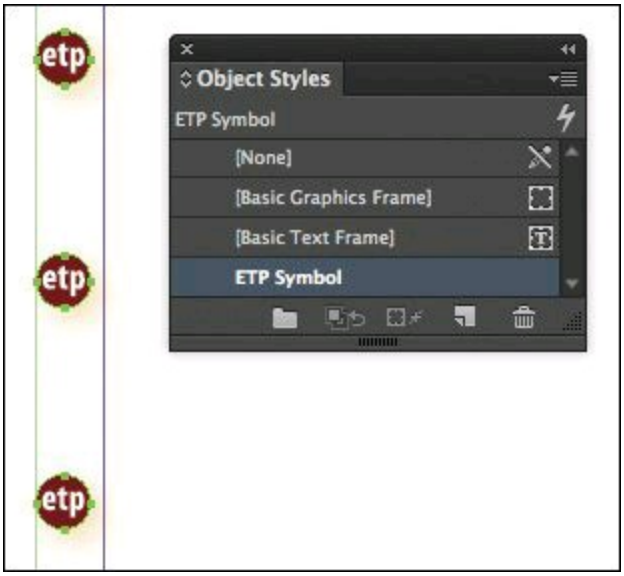
Once you have even a rough idea of how you want text, objects, and tables to look, you can start creating styles and applying them. Then, as you experiment with a design and

make changes, you can simply update the style definitions using the Redefine Style option—this automatically updates the formatting of anything to which the style is applied. The panel menus for all of the InDesign Styles panels, such as Paragraph Styles and Table Styles, provide the Redefine Style option.

To quickly select the etp objects, you will hide the layer containing the text.

2. Choose Window > Layers. In the Layers panel, click in the visibility box to the far left of Layer 1 to hide this layer.

3. Select the Selection tool ( ) and choose Edit > Select All.
4. With all of the etp circles selected, click the ETP Symbol style in the Object Styles panel.



5. In the Layers panel, click in the column to the far left of Layer 1 to display the layer again.
6. Choose Edit > Deselect All, then choose File > Save.

Creating and applying table and cell styles

Table and cell styles let you format tables with the same convenience and consistency you get from styling text with paragraph and character styles. Table styles let you control the visual attributes of the table, including the table border, space before and after the table, row and column strokes, and alternating fill patterns. Cell styles let you control cell inset spacing, vertical justification, individual cell strokes and fills, and diagonal lines. You'll learn more about creating tables in Lesson 11, "Creating Tables."

In this exercise, you'll create and apply a table style and two cell styles to tables in the catalog document, to help distinguish the different descriptions of tea.

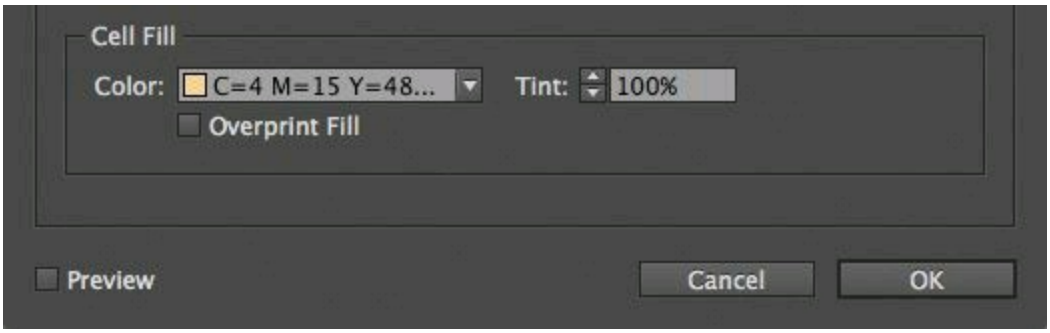
Creating cell styles

You'll begin by creating cell styles for both the header row and body rows of the table at the bottom of page 3. Later, you'll nest these two styles inside the Table style, a process similar to how you nested character styles inside a paragraph style earlier in this lesson. You'll now create two cell styles.

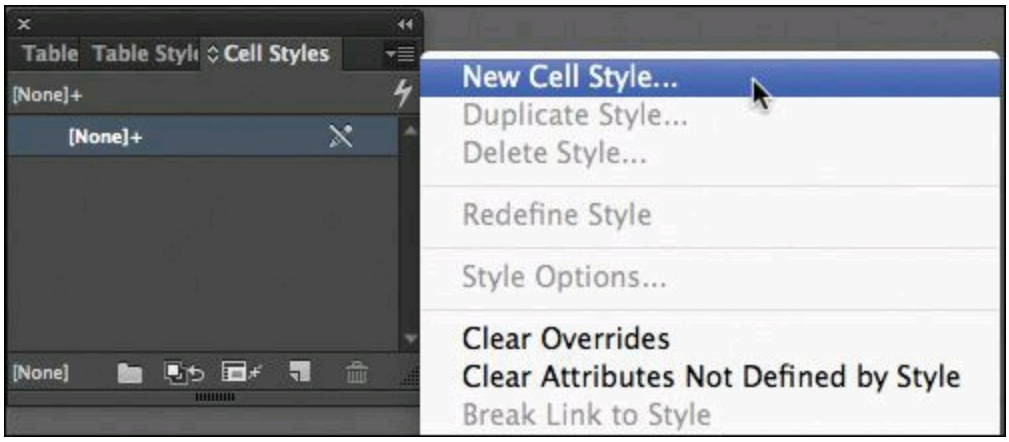
1. Double-click page 3 in the Pages panel, and then choose View > Fit Page In Window.
2. Using the Zoom tool ( ), drag around the table at the bottom of the page to make it easily visible.
3. Using the Type tool ( ), drag to select the first two cells in the header row, containing the words "Tea" and "Finished Leaf."

Tea	Finished Leaf	Color	Brewing Details
White	Soft, grayish white	Pale yellow or pinkish	165° for 5-7 min
Green	Dull to brilliant green	Green or yellowish	180° for 2-4 min
Oolong	Blackish or greenish	Green to brownish	212° for 5-7 min
Black	Lustrous black	Rich red or brownish	212° for 3-5 min

4. Choose Table > Cell Options > Strokes And Fills. For Cell Fill, select the pale yellow color swatch (C = 4, M = 15, Y = 48, K = 0). Click OK.



5. With the cells still selected, open the Cell Styles panel by choosing Window > Styles > Cell Styles.
6. From the Cell Styles panel menu, choose New Cell Style.



The cell formatting you applied to the selected cells is displayed in the Style Settings box. You'll also notice additional cell formatting options on the left side of the dialog box. In this

exercise, however, you are only going to set the desired paragraph style to use for the text within the header row.

Tip

You can create new styles from any InDesign Styles panel (Character, Object, Table, and so on) by choosing New Style from the panel menu or clicking the Create New Style button, at the bottom of the panel.

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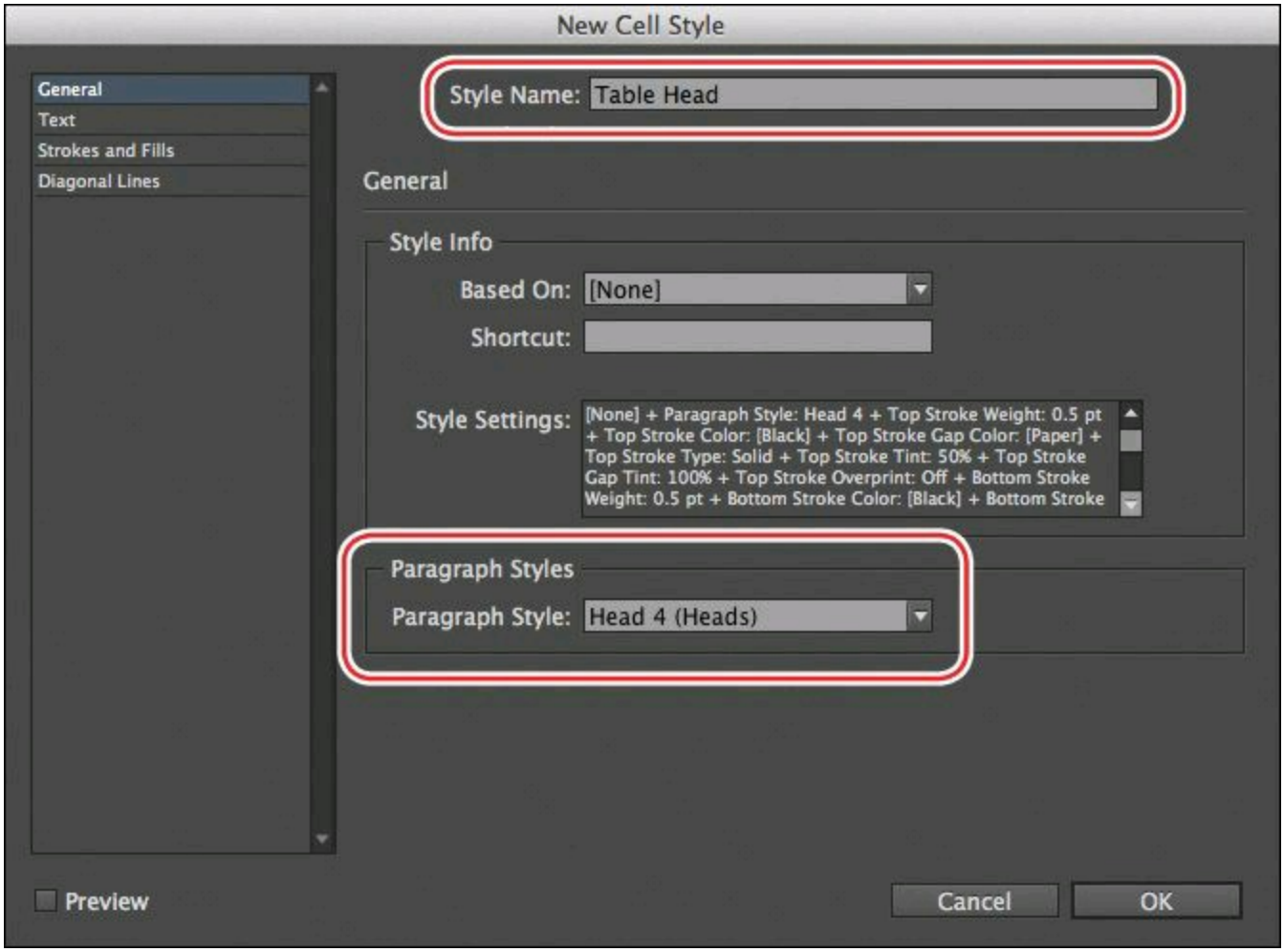
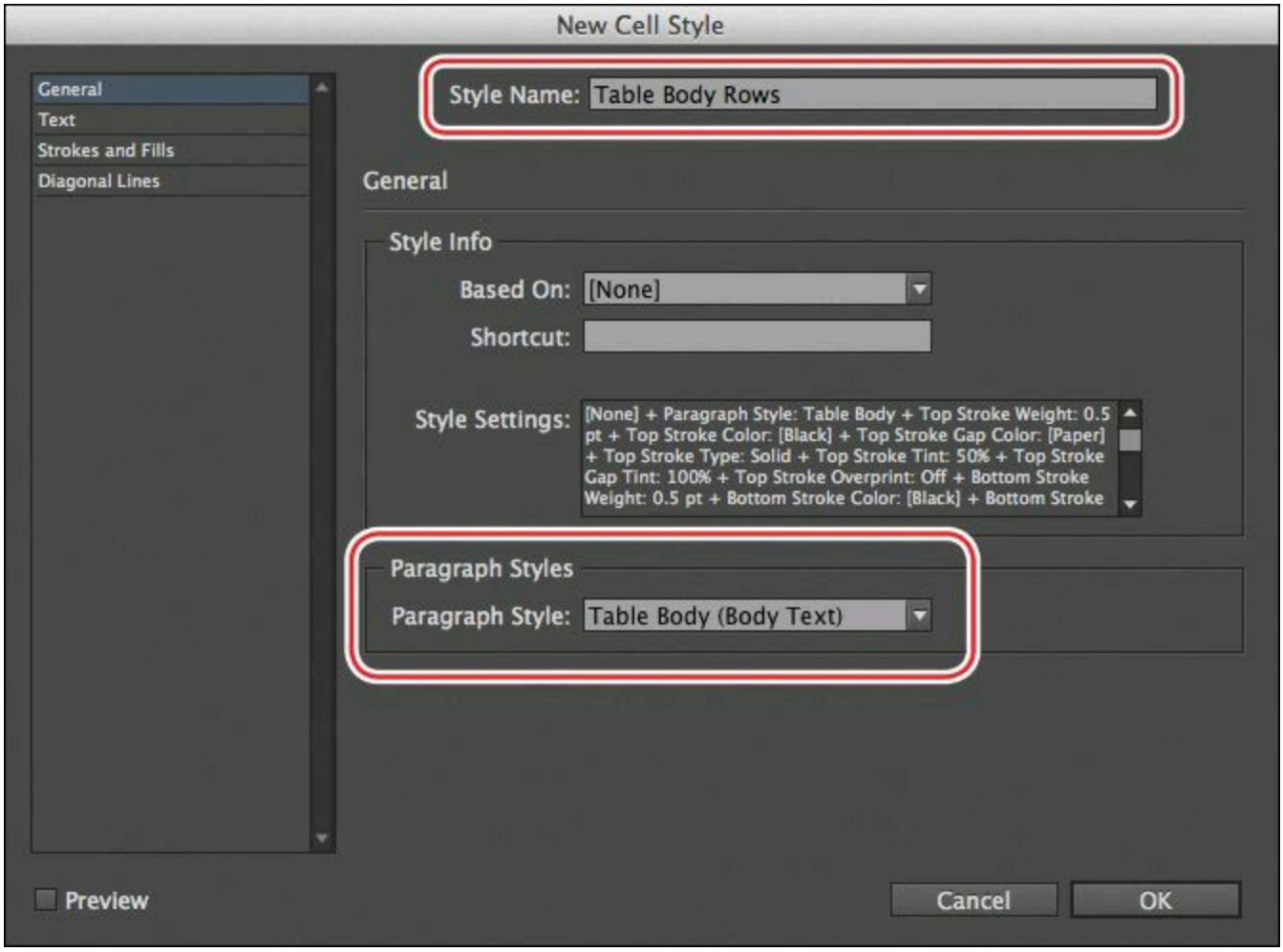
7. In the Style Name box at the top of the New Cell Style dialog box, type **Table Head**.
8. From the Paragraph Style pop-up menu, choose Head 4. This paragraph style was already created in the document. Click OK.



Now you will create a new cell style for the body rows.

9. Using the Type tool (T), select the first two cells of the second row of the table. They contain the words “White” and “Soft, grayish white.”
10. From the Cell Styles panel menu, choose New Cell Style.
11. In the Style Name box, name this style **Table Body Rows**.
12. From the Paragraph Style pop-up menu, choose Table Body. This paragraph style was already created in the document.



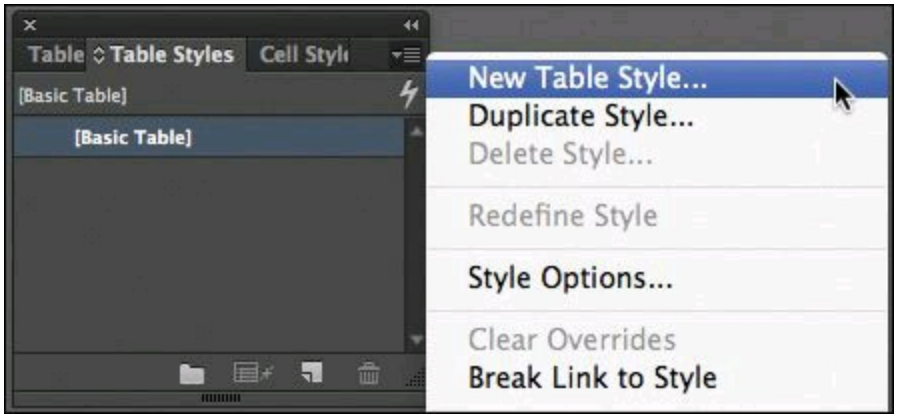
13. Click OK. The two new cell styles appear in the Cell Styles panel. Choose Edit > Deselect All.

14. Choose File > Save.

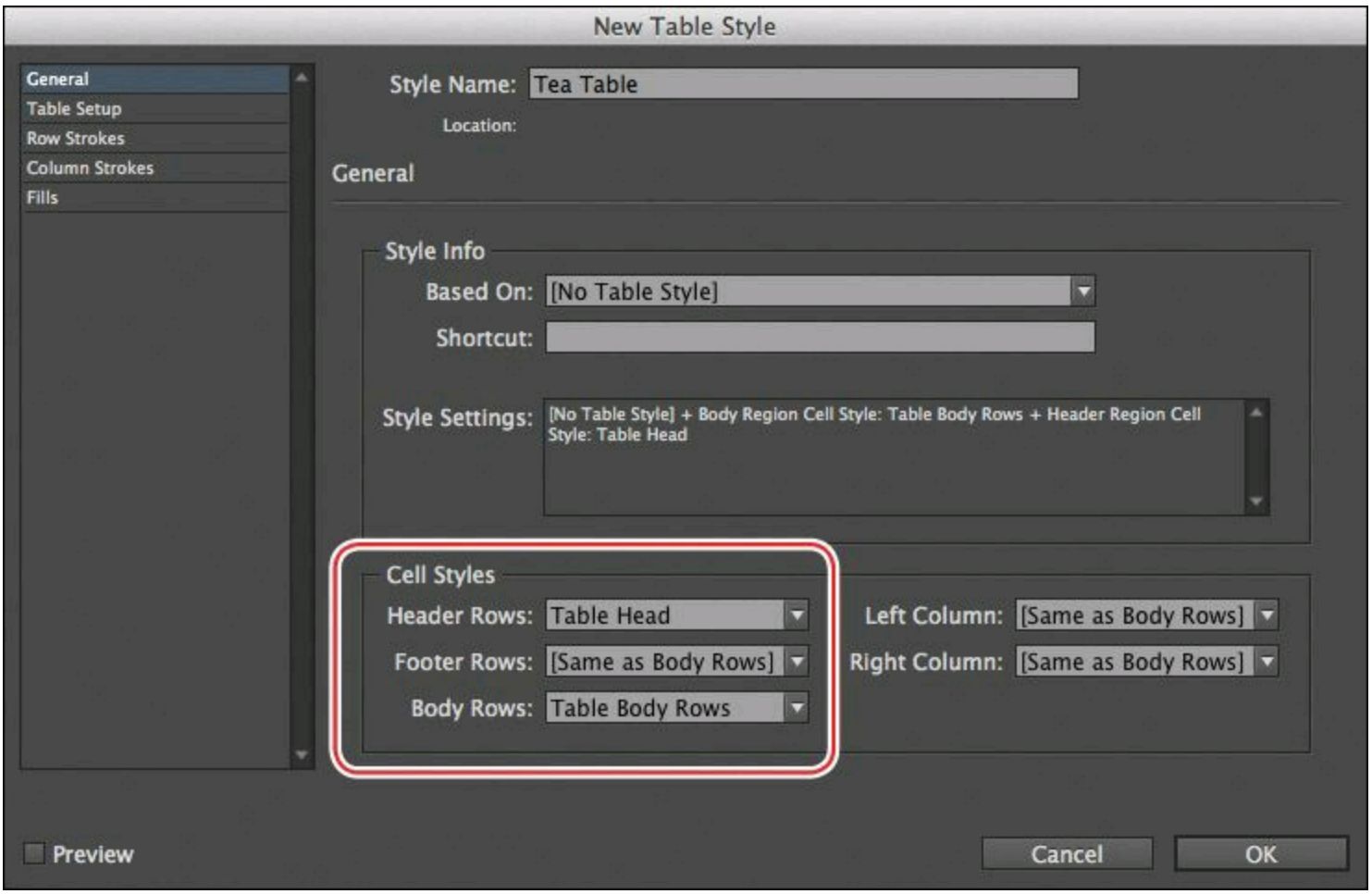
Creating a table style

Now you'll create a table style that not only formats the overall look of the table, but applies the two cell styles you just created to the header and body rows.

1. With the table still easily visible onscreen, select the Type tool (T). Click to place an insertion point anywhere in the table.
2. Choose Window > Styles > Table Styles. From the Table Styles panel menu, choose New Table Style.

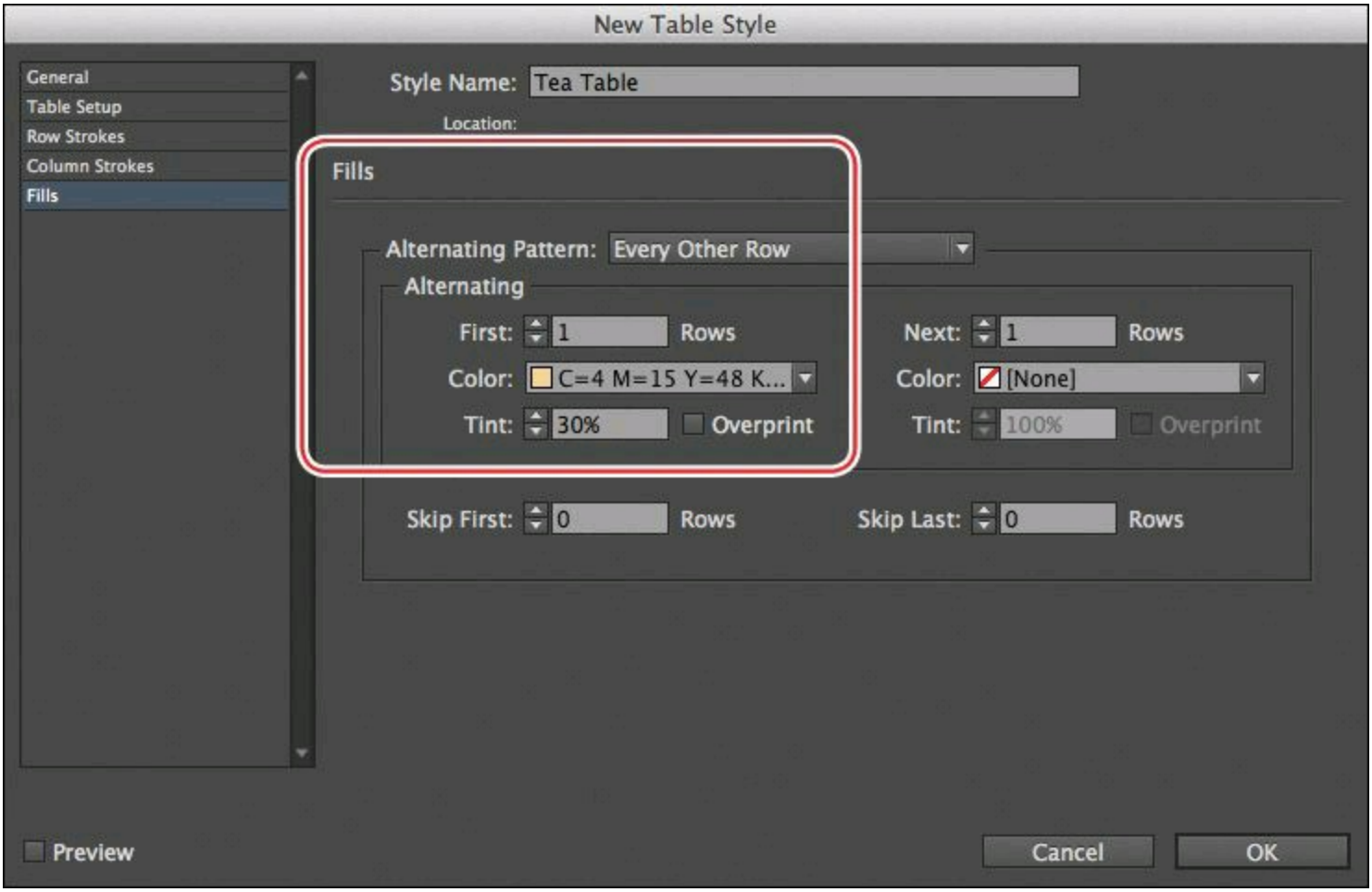


3. In the Style Name box, type **Tea Table.**
4. In the Cell Styles section, choose the following options:
   - Table Head from the Header Rows menu.
   - Table Body Rows from the Body Rows menu.



You'll now set up the table style to apply alternating rows of color to the body rows.

5. Select the Fills category on the left side of the New Table Style dialog box.
6. Choose Every Other Row from the Alternating Pattern pop-up menu. The options for alternating rows appear.
7. Specify the following Alternating options:
   - For Color, select the pale yellow color swatch (C = 4, M = 15, Y = 48, K = 0).
   - For Tint, type **30**%.



8. Click OK. The new table style, Tea Table, appears in the Table Styles panel.

9. Choose Edit > Deselect All, then choose File > Save.

Applying a table style

Now you'll apply the table style you just created to the two tables in the document.

Tip

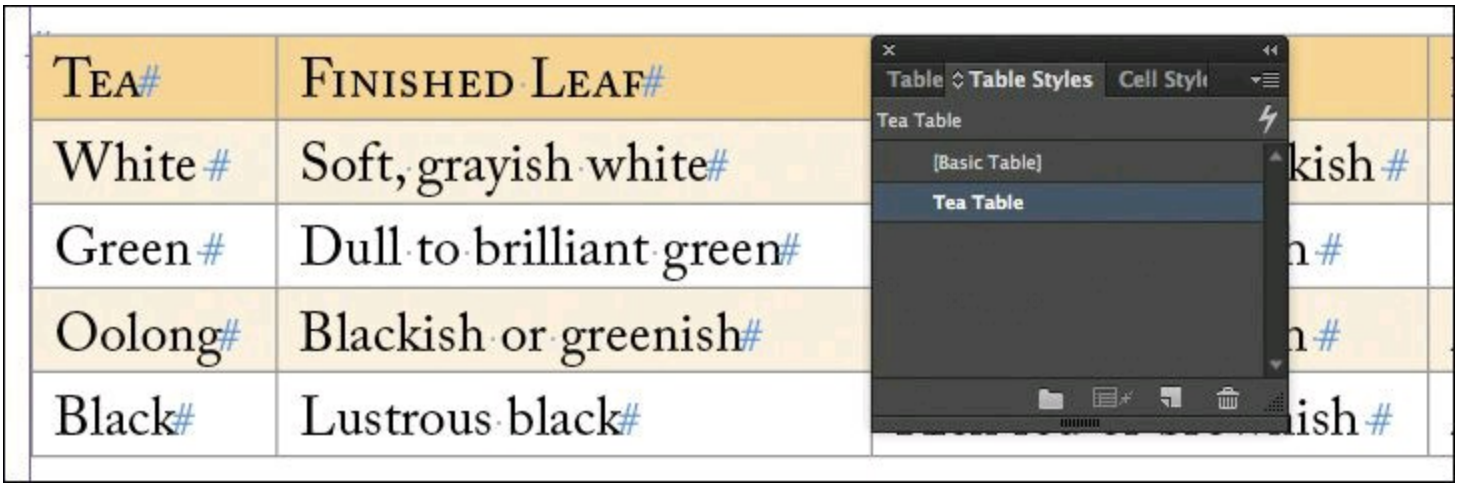
If you create a table from existing text (using Table > Convert Text To Table), you can apply a table style as you convert the text.

---

1. With the table still easily visible onscreen, select the Type tool ( ). Click to place an insertion point anywhere in the table.

2. In the Tables Styles panel, click the Tea Table style. The table is reformatted with the table and

cell styles you created.



3. Double-click page 6 in the Pages panel, then choose View > Fit Page In Window. Click to place an insertion point anywhere in the Tea Tasting Overview table.
4. In the Table Styles panel, click the Tea Table style. The table is reformatted with the table and cell styles you created.

5. Choose Edit > Deselect All, then choose File > Save.

Globally updating styles

There are two ways to update paragraph, character, object, table, and cell styles in InDesign. The first is simply to open a style options dialog box and make changes to the formatting options. Because there's a link between the style and the text to which it's applied, all the text is updated to reflect any changes you make to the style.

The other way to update a style is to use local formatting to modify some text, and then redefine the style based on the updated formatting. In this exercise, you'll make a change to the Head 3 style to include a rule below it.

1. Double-click page 4 in the Pages panel, then choose View > Fit Page In Window.
2. Using the Type tool (T), drag to select the "Black Tea" subhead at the top of the first column.
3. If necessary, click the Character Formatting Controls button (A) in the Control panel. Type **13**

in the Font Size box and press Enter (Windows) or Return (Mac OS).

4. Choose Type > Paragraph to display the Paragraph panel. Choose Paragraph Rules from the panel menu.

5. In the Paragraph Rules dialog box, choose Rule Below from the menu at the top of the dialog box, and select Rule On. Make sure that Preview is selected, and move the dialog box so you can see "Black Tea" on your screen.

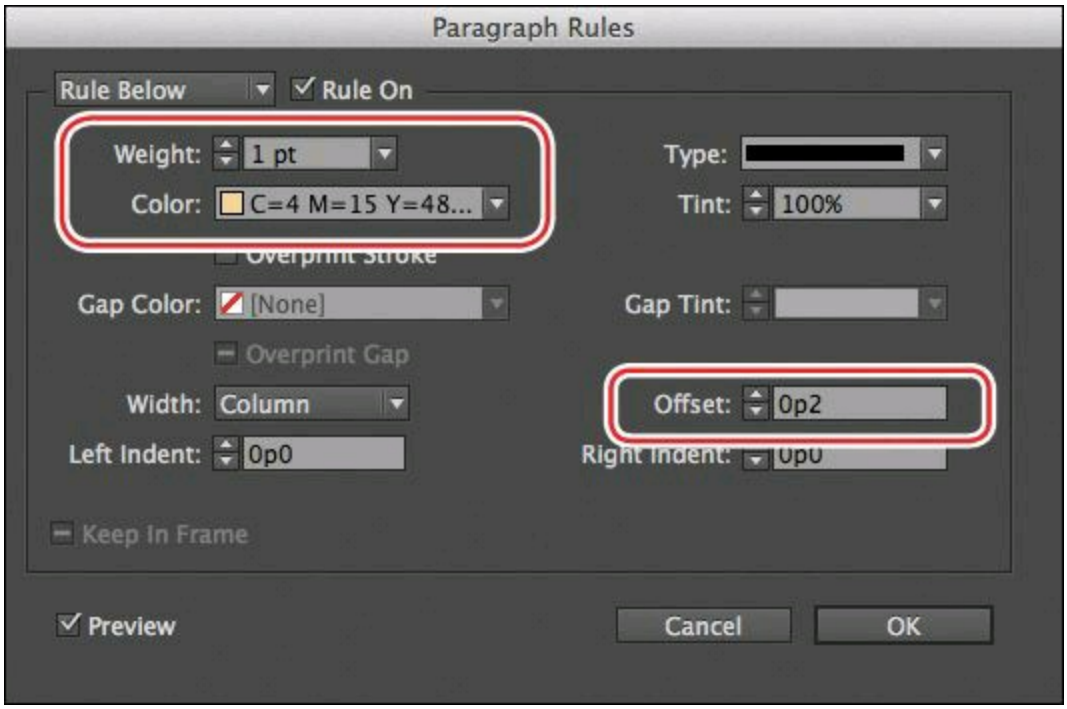
6. Format the rule using the following settings:

   • Weight: 1 pt

   • Color: C = 4, M = 15, Y = 48, K = 0 (pale yellow swatch)

   • Offset: p2

   Leave all other settings at their defaults.



7. Click OK. A thin yellow line now appears below "Black Tea."

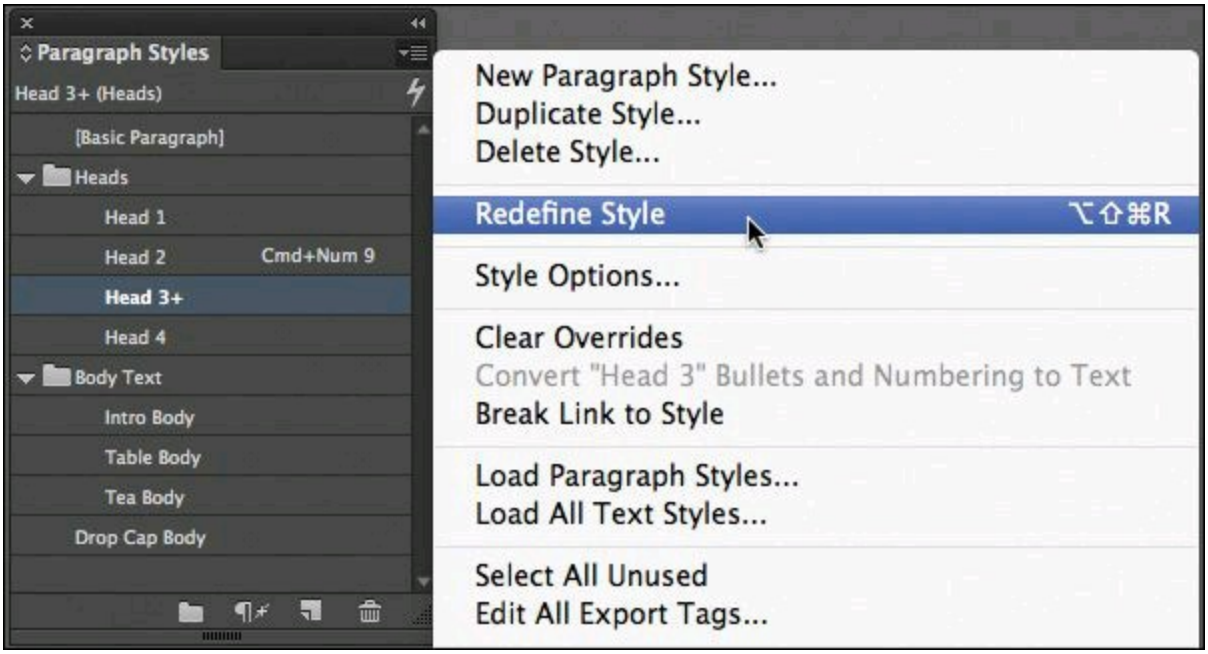
8. If it's not already visible, choose Type > Paragraph Styles to view the Paragraph Styles panel.

   In the Paragraph Styles panel, notice that the Head 3 style is selected, indicating that it is applied to the selected text. You will also see a plus sign (+) next to the Head 3 style name. This indicates that the selected text has local formatting applied to it, which is overriding the applied style.

9. Point at the Head 3 paragraph style to see how the current formatting differs from the original paragraph style.

Now you'll redefine the paragraph style so that the local change is incorporated in the paragraph style definition and automatically applied to all the headlines previously formatted with the Head 3 style.

10. In the Paragraph Styles panel menu, choose Redefine Style. The + should no longer appear next to the Head 3 style name. All headlines in the document that have been styled with Head 3 should globally update to reflect the changes you made.



Note

You can use the process in step 8 to redefine any type of style based on local formatting.

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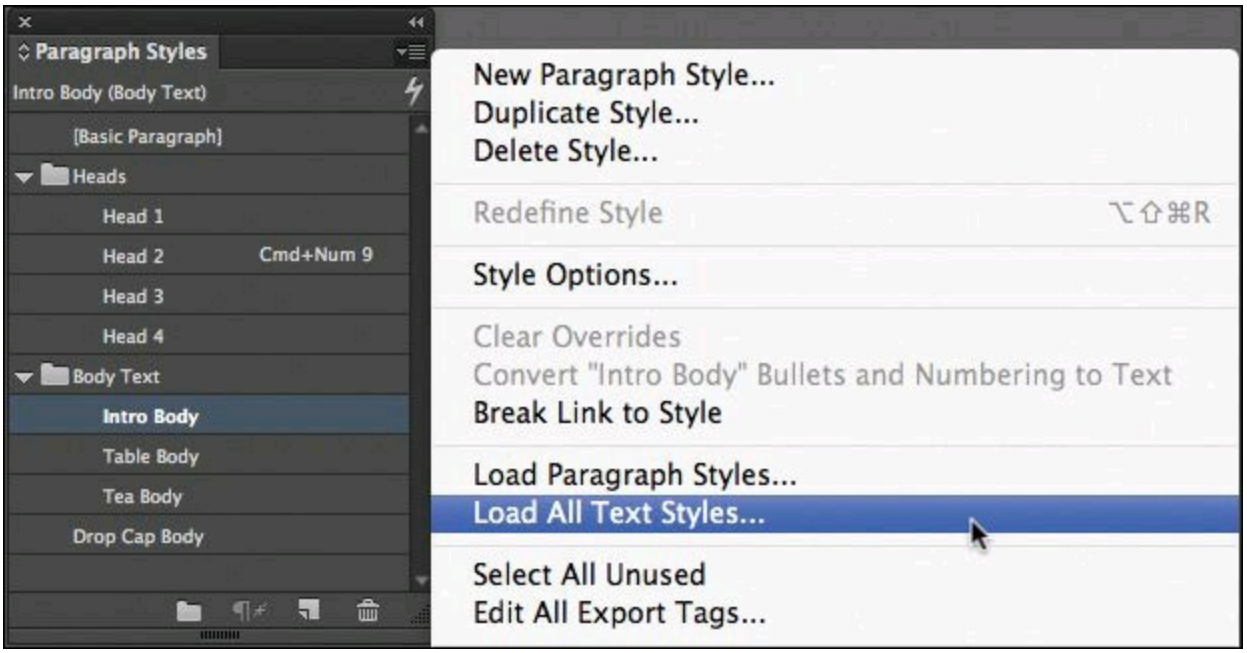
11. Choose Edit > Deselect All, then choose File > Save.

Loading styles from another document

Styles appear only in the document in which you create them. However, it's easy to share styles

between InDesign documents by loading, or importing, styles from other InDesign documents. In this exercise, you'll import a paragraph style from the finished document 09_End.indd and apply the style to the first body paragraph on page 2.

1. Double-click page 2 in the Pages panel, then choose View > Fit Page In Window.
2. If it's not already visible, choose Type > Paragraph Styles to view the Paragraph Styles panel.
3. Choose Load All Text Styles from the Paragraph Styles panel menu.



4. In the Open A File dialog box, double-click 09_End.indd, in the Lesson09 folder. The Load Styles dialog box appears.
5. Click Uncheck All; you do not need to import all the styles, as they already exist in this document.

Tip

Because the selected paragraph style uses the Drop Caps And Nested Style feature to automatically apply the Drop Cap character style, this style is also selected.

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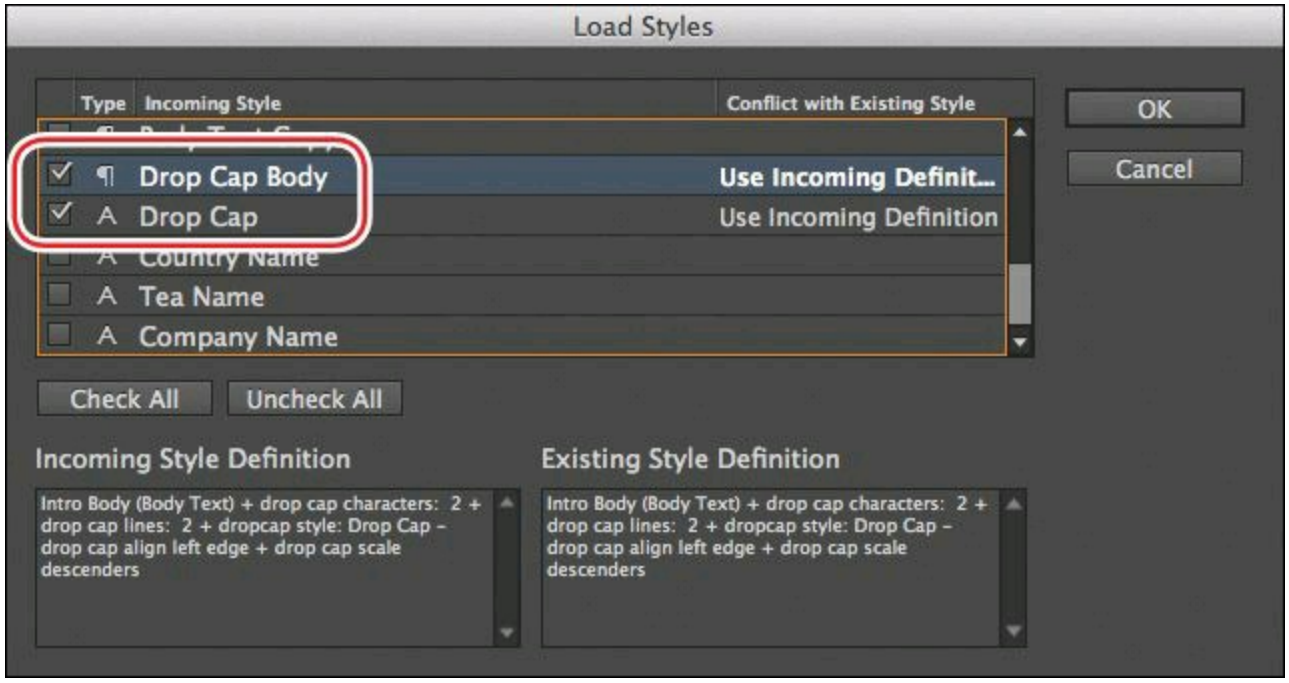
6. Select the paragraph style Drop Cap Body. Scroll down to Drop Cap and make sure it is selected as well.



7. Click OK to import both styles.

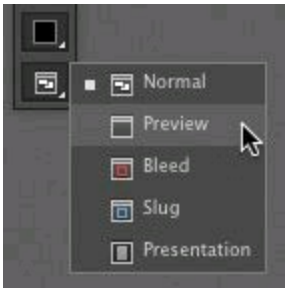
8. Using the Type tool (T), place an insertion point in the second body paragraph, which starts with "We carry," and select the new Drop Cap Body style in the Paragraph Styles panel. The initial "We" should become an italicized burgundy drop cap.

9. Choose Edit > Deselect All, then choose File > Save.

Finishing up

As a final step, you'll preview the document in its finished state.

1. At the bottom of the Tools panel, select Preview.



2. Choose View > Fit Page In Window.
3. Press Tab to hide all of the panels and review the results of your work.

Congratulations! You have now completed this lesson.

Exploring on your own

When you're creating a long document or a template to use as the basis for other documents, you want to take full advantage of all styles features. To fine-tune the styles further, try the following:

- Rearrange styles in the Paragraph Styles panel. For example, drag the new Drop Cap Body style into the Body Text group.
- Experiment with modifying formatting and redefining styles, including object, table, character, and paragraph styles. For example, change the background color of a table cell and update the cell style.
- Create additional character styles that change only one attribute of formatting—such as creating a character style that applies only a different color.
- Add more keyboard shortcuts to the existing styles.

Review questions

1. How can using object styles speed up your workflow?
2. What must you have created previously in order to create a nested style?
3. What are the two ways to globally update a style you've applied in an InDesign document?
4. How would you import styles from another InDesign document?

Review answers

1. Object styles save time by letting you keep together a group of formatting attributes that you can quickly apply to graphics and frames. If you need to update the formatting, you don't have to change each frame formatted with the style individually. Instead, you can simply modify the object style to automatically update all the frames to which it is applied.
2. The two prerequisites for creating nested styles are that you have first created a character style, and that you have built a paragraph style in which to nest it.
3. There are two ways to update styles in InDesign. The first is to edit the style itself and make changes to the formatting options. The other is to use local formatting to change an instance, and then redefine the style based on that instance.
4. Importing styles is easy. Simply choose the appropriate Load Style option from the Object Styles panel menu, Character Styles panel menu, Paragraph Styles panel menu, Table Styles panel menu, or Cell Styles panel menu, and locate the InDesign document from which you want

to load them. The styles are then loaded into the respective panel and are immediately available for use inside your document.

10. Importing and Modifying Graphics

Lesson Overview

In this lesson, you'll learn how to do the following:

- Distinguish between vector and bitmap graphics.
- Import Adobe Photoshop and Adobe Illustrator graphics.
- Manage imported graphics files using the Links panel.
- Adjust the display quality of graphics.
- Adjust the appearance of graphics by manipulating paths and alpha channels.
- Create an anchored graphics frame that flows with text.
- Create and use libraries of objects.
- Import graphics using Adobe Bridge.

This lesson will take approximately 60 minutes.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the Getting Started section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.

You can easily enhance your document with photographs and artwork imported from Adobe Photoshop, Adobe Illustrator, and other graphics applications. If these imported graphics change, InDesign can notify you that a newer version of a graphic is available. You can update or replace imported graphics at any time.

Getting started

In this lesson, you'll work on a two-fold, three-panel brochure for a CD by importing, manipulating, and managing graphics from Adobe Photoshop and Adobe Illustrator. The insert is designed so that after printing and trimming it fits into a CD case.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

This lesson includes steps that you can perform using Adobe Photoshop if you have it installed on your computer.

1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.
2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced.
3. Choose File > Open, and open the 10_a_Start.indd file in the Lesson10 folder, located inside the Lessons folder within the InDesignCIB folder on your hard drive. A message appears saying that the document contains links to sources that have been modified. (If the Adobe Typekit dialog box displays, click Sync Fonts.)
4. Click Don't Update Links. You will fix the modified links later in the lesson.
5. If necessary, close the Links panel so it doesn't obscure your view of the document. The Links panel opens automatically whenever you open an InDesign document that contains missing or modified links.
6. To see what the finished document looks like, open the 10_b_End.indd file in the same folder. If you prefer, you can leave the document open as you work to act as a guide. If you leave it open, choose 10_a_Start.indd from the Window menu or click the 10_a_Start.indd document tab to return to that document.

7. Choose File > Save As, rename the file **10_cdinsert.indd**, and save it in the Lesson10 folder.

Note

As you work through the lesson, move panels around or change the magnification to a level that works best for you. For more information, see "Changing the magnification of a document" in Lesson 1, "Introducing the Workspace."

Adding graphics from other programs

InDesign supports many common graphics file formats. While this means that you can use graphics that were created using a wide range of applications, InDesign works best with other Adobe professional graphics applications, such as Photoshop, Illustrator, and Acrobat.

By default, imported graphics are linked to an InDesign document, which means that InDesign displays a preview of the graphics file in your layout without actually copying the entire graphics file into the document.

There are two major advantages to linking graphics files. First, it saves disk space, especially if you reuse the same graphic in many InDesign documents. Second, you can edit a linked graphic in the application you used to create it, and then simply update the link in the InDesign Links panel. Updating a linked file that has been modified maintains the current location and settings for the graphic file and replaces the previous onscreen version with the updated graphic.

All linked graphics and text files are listed in the Links panel (Window > Links), which provides buttons and commands for managing links. When you print an InDesign document or export a document as an Adobe Portable Document Format (PDF) file, InDesign uses the links to produce the highest level of quality available from the original, externally stored versions of the placed graphics.

Comparing vector and bitmap graphics

The drawing tools of Adobe InDesign and Adobe Illustrator create vector graphics, which are made up of shapes based on mathematical expressions. Vector graphics consist of smooth lines that retain their clarity when scaled. They are appropriate for illustrations, type, and graphics such as logos, all of which are typically scaled to different sizes.

Bitmap images are made up of a grid of pixels and are typically created with digital cameras and scanners and then modified using an image-editing application, such as Adobe Photoshop. In working with bitmap images, you edit pixels rather than objects or shapes. Because bitmap graphics can represent subtle gradations of shade and color, they are appropriate for continuous-tone images, such as photographs or artwork created in painting applications. A disadvantage of bitmap graphics is that they lose definition and appear “jagged” when enlarged. Additionally, bitmap images are typically larger in file size than a similar vector graphic.

Logo drawn as vector art (left) and rasterized as bitmap art (right).

In general, use vector drawing tools to create art or type with clean lines that look good at any size, such as a logo used on a business card and also on a poster. You can create vector artwork using the InDesign drawing tools, or you might prefer to take advantage of the wider range of vector drawing tools available in Illustrator. You can use Photoshop to create bitmap images that have the soft edges of painted or photographic art and to apply special effects to artwork.

Managing links to imported files

When you opened the lesson file, you saw an alert message about problems with the linked files. You’ll resolve those issues using the Links panel, which provides complete information about the status of all linked text and graphics file in a document.

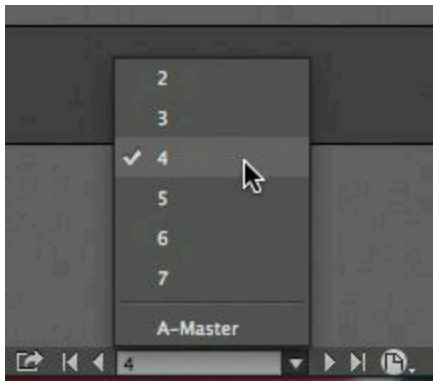
You can use the Links panel to manage placed graphics and text files in many other ways. For example, you can update graphics and text files that have been modified since they were placed, and you can replace graphics and text files with different files. All of the techniques you learn in this lesson about managing linked files apply equally to graphics files and text files that you place in your

documents.

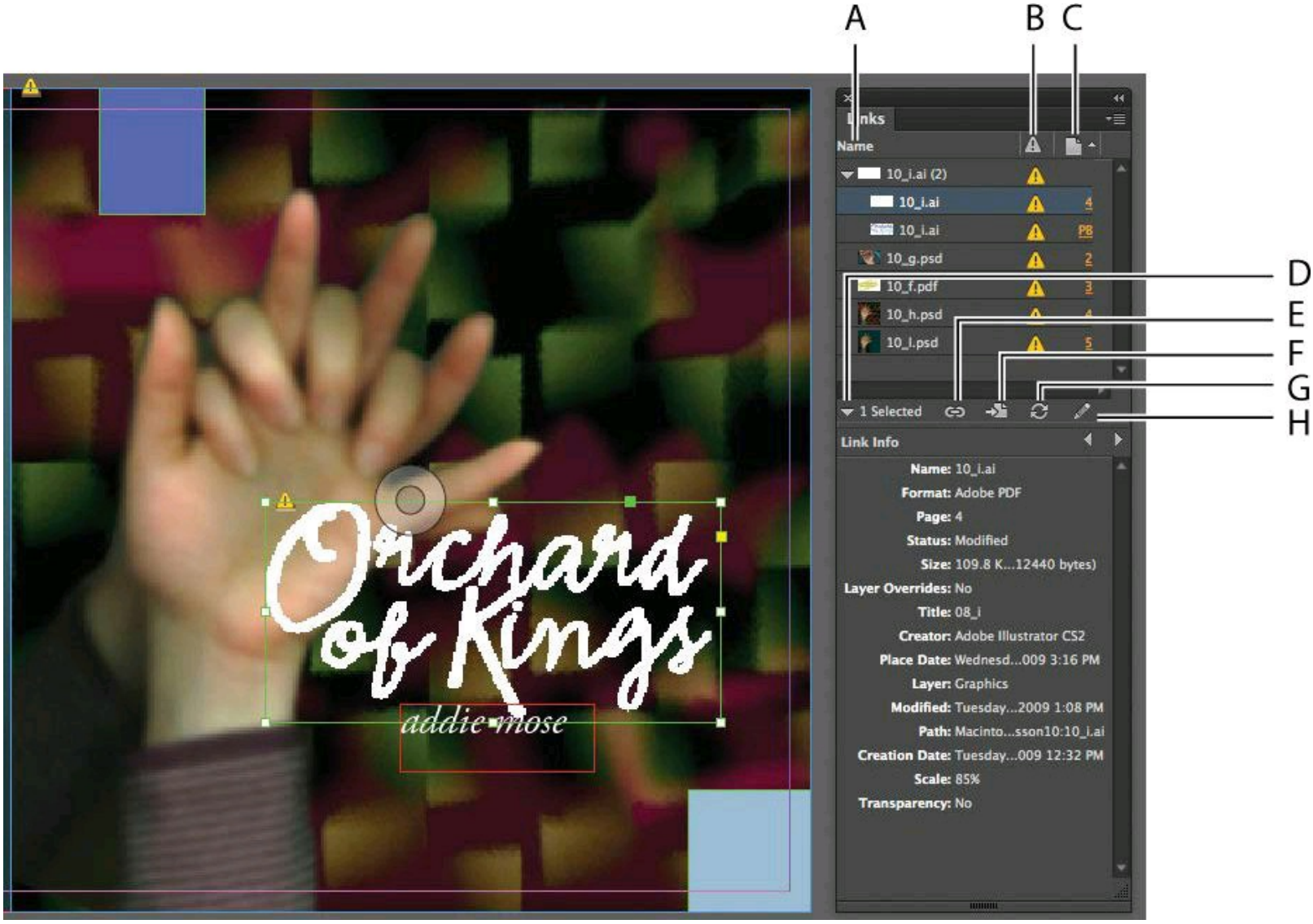
Identifying imported images

To identify some of the images that have already been imported into the document, you'll use two different techniques involving the Links panel. Later in this lesson, you'll also use the Links panel to edit and update imported graphics.

1. Center page 4 in the document window by choosing it from the Page Number box at the lower-left corner of the document window.



2. If the Links panel is not visible, choose Window > Links.
3. Using the Selection tool ( ), select the Orchard of Kings logo type on page 4, the far right page of the first spread. (Click outside the content grabber in the center of the frame so you select the frame and not the graphic, though you can select either for this task.) Notice that the graphic's filename, 10_i.ai, becomes selected in the Links panel when you select the graphic in the layout.



A. Filename column
B. Status column
C. Page column
D. Show/Hide Link Information button
E. Relink button
F. Go To Link button
G. Update Link button
H. Edit Original button

Now you'll use the Links panel to locate a graphic in the layout.

Tip

You can click the page number to the right of a filename in the Links panel to go to the link and center it in the document window.

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4. In the Links panel, select 10_g.psd, and then click the Go To Link button ( ). The graphic becomes selected and centered on the screen. This is a quick way to find a graphic in a document when you know its filename.

These techniques for identifying and locating linked graphics are useful throughout this lesson

and whenever you work with a large number of imported files.

Viewing information about linked files

The Links panel makes it easy to work with linked graphics and text files and to display additional information about linked files.

Tip

You can detach the Links panel from its group of panels by dragging its tab. Once you've detached the panel, you can resize it by dragging its left or right edge, the bottom edge, or its lower-right or lower-left corner.

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1. Make sure that the graphic named 10_g.psd is selected in the Links panel. If you cannot see the names of all the linked files without scrolling, drag the horizontal divider bar in the Links panel downward to enlarge the top half of the panel so that all the links are visible. The Link Info section at the bottom half of the panel displays information about the selected link.
2. Click the Select Next Link In The List triangle ( ) to view information about the following file in the Links panel list, 10_f.pdf. You can quickly examine all the links in the list this way. Currently, every link displays an alert icon ( ) in the Status column. This icon indicates a linking problem, which you'll address later. After you've examined the link information for various images, choose Edit > Deselect All, and then click the Show/Hide Link Information button ( ) above Link Info to hide the Link Info section.

   By default, files are sorted in the Links panel by page number. You can sort the file list in different ways.
3. Click the Name column heading in the Links panel. The panel now lists the links in alphabetical order. Each time you click a column heading, the list toggles between descending order and ascending order.

Showing files in Explorer (Windows) or Finder (Mac OS)

Although the Links panel gives you information about the attributes and location of a specific

imported graphics file, it does not let you make changes to the file or change the name of the file. You can access the original file of an imported graphics file by using the Reveal In Explorer (Windows) or Reveal In Finder (Mac OS) option.

Note

For links that are missing the Reveal In Explorer (Windows) or Reveal In Finder (Mac OS) command is not available.

Tip

You can also choose Reveal In Bridge from the Links panel menu to locate an imported graphic file and rename it.

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1. Select 10_g.psd if it is not currently chosen. From the Links panel menu, choose Reveal In Explorer (Windows) or Reveal In Finder (Mac OS) to open the folder where the linked file is currently stored and select the file. This feature is useful for locating files on your hard drive and renaming them, if necessary.
2. Close the window and return to InDesign.

Updating revised graphics

Even after you place text or graphics files in your InDesign document, you can still use other applications to modify those files. The Links panel indicates which files have been modified outside of InDesign and gives you the choice of updating your document with the latest versions of those files.

In the Links panel, the file 10_i.ai has an alert icon (), indicating that the original file has been modified. This is one of the files that caused the alert message to appear when you first opened this document. You'll update the link for this file so that the InDesign document uses the current version.

1. If necessary, click the disclosure triangle () in the Links panel to the left of the file 10_i.ai to reveal two instances of the imported file. Select the instance of the 10_i.ai file that's on page 4, and click the Go To Link button () to view the graphic in magnified view. You don't have to do this step, but it's a quick way to double-check which imported file you are about to update and see the results.

Tip

You can also double-click the Link Badge in the links panel or click the Link Badge displayed at the upper-left corner of the graphics frame to update the link.

2. Click the Update Link button ( ). The appearance of the image in the document changes to represent its newer version, the Modified alert icon is no longer displayed in the Links panel, and the Link Badge near the upper-left corner of the graphics frame changes from Modified (yellow triangle) to OK (linked chain).

Tip

You can also choose Reveal In Bridge from the Links panel menu to locate an imported graphic file and rename it.

3. To update the rest of the modified graphic files, choose Update All Links from the Links panel menu.

Now you'll replace the image of the hands on the first spread (pages 2–4) with a modified image. You'll use the Relink button to reassign the link to another graphic.

4. Go to pages 2–4 (the first spread), and choose View > Fit Spread In Window.
5. Use the Selection tool ( ) to select the 10_h.psd image on page 4. It's the photograph of the interlocked hands. (If you click within the content grabber, you'll select the graphic rather than the frame, but for this task, you can select either.) You can tell when you've selected the right image because the filename becomes selected in the Links panel.
6. Click the Relink button ( ) in the Links panel.
7. Browse to find the 10_j.psd file in the Lesson10 folder, and then click Open. The new version of the image (which has a different background) replaces the original image, and the Links panel is updated accordingly.
8. Click a blank area of the pasteboard to deselect all of the objects on the spread.
9. Choose File > Save to save your work.

Viewing link status in the Links panel

A linked graphic can appear in the Links panel in any of the following three ways:

- An up-to-date graphic displays only the filename and its page in the document.
- A modified file displays a yellow triangle with an exclamation point ( ). This alert icon means that the version of the file on disk is more recent than the version in your document. For example, this icon will appear if you import a Photoshop graphic into InDesign, and then another artist edits and saves the original graphic using Photoshop.
- A missing file displays a red hexagon with a question mark ( ). The file isn't at the location from which it was originally imported, though the file may still exist somewhere. This can happen if someone moves an original file to a different folder or server after it's been imported into an InDesign document. You can't know whether a missing graphic is up to date until its original is located. If you print or export a document when this icon is displayed, the graphic may not print or export at full resolution.

—From InDesign Help

Tip

You can choose Panel Options from the Links panel menu and customize the columns and information shown in the panel. After adding columns, you can adjust their size and position.

Adjusting display quality

Now that you've resolved all of the links, you're ready to start adding more graphics. But first, you will adjust the view quality of the Illustrator file (10_i.ai) that you updated earlier in this lesson.

When you place an image in a document, InDesign automatically creates a lowresolution (proxy) view of it, corresponding to the current settings in the Display Performance section of the Preferences dialog box. The images in this document are currently low-resolution proxies, which is why they appear to have jagged edges. Reducing the onscreen quality of placed graphics displays pages faster and doesn't affect the quality of the final output. You can control the degree of detail InDesign uses to

display placed graphics.

1. In the Links panel, select the 10_i.ai file you updated in the previous exercise (on page 4). Click the Go To Link button ( ) to view the graphic in magnified view.
2. Right-click (Windows) or Control-click (Mac OS) the Orchard of Kings graphic, and then choose Display Performance > High Quality Display from the context menu. The image appears at full resolution. You can use this process to confirm the clarity, appearance, and position of a placed graphic in your InDesign layout.

Onscreen display using Typical Display.

High Quality Display.

3. Choose View > Display Performance > High Quality Display. This setting changes the display performance for the entire document. All graphics are displayed at the highest quality.

   On older computers, or for designs with many imported graphics, this setting can sometimes result in slower screen redraw. In most cases, it is advisable to set your Display Performance to Typical Display, and then change the display quality of individual graphics as needed.
4. Choose File > Save.

Working with clipping paths

You can remove unwanted backgrounds from images using InDesign. You'll get some experience doing this in the following exercise. In addition to removing the background in InDesign, you can create paths or alpha channels in Photoshop that can be used to silhouette an image that's been placed in an InDesign layout.

The image you will be placing has a solid, white rectangular background that blocks the view of the area behind it. You can hide unwanted parts of an image using a clipping path—a drawn vector outline that acts as a mask. InDesign can create clipping paths from many kinds of images:

- If you draw a path in Photoshop and save it with the image, InDesign can create a clipping path from it.
- If you paint an alpha channel in Photoshop and save it with the image, InDesign can create a clipping path from it. An alpha channel carries transparent and opaque areas and is commonly created with images used for photo or video compositing.
- If the image has a relatively light or white background (or a relatively dark background if the subject matter is light), InDesign can automatically detect the edge between the subject and the background and create a clipping path.

The image you will be placing (of three pears) doesn't have a clipping path or an alpha channel, but it does have a solid white background that InDesign can remove.

Removing a white background using InDesign

Now you'll hide the white background that surrounds three pears in an image. You can use the Detect Edges option of the Clipping Path command (Object > Clipping Path) to hide a solid white background that surrounds an image. The Detect Edges option hides areas of an image by creating a separate path around each distinct shape within the image.

1. Navigate to page 7 of the document by double-clicking page 7 in the Pages panel.
2. In the Layers panel, make sure that the Photos layer is selected so that the imported image is placed on that layer. Choose File > Place, and double-click the file 10_c.psd in the Lesson10 folder.
3. Position the loaded graphics icon ( ) outside the square on the left—to the left and slightly below the top edge (make sure you are not placing the pointer in the square itself), and click to place an image of three pears on a white background. If you need to reposition the graphics frame to match the image below, do so now.

4. Choose Object > Clipping Path > Options. Move the Clipping Path dialog box, if necessary, so that you can see the pear image.
5. Choose Detect Edges from the Type menu. If Preview is not selected, select it now. The white background is almost entirely eliminated from the image.

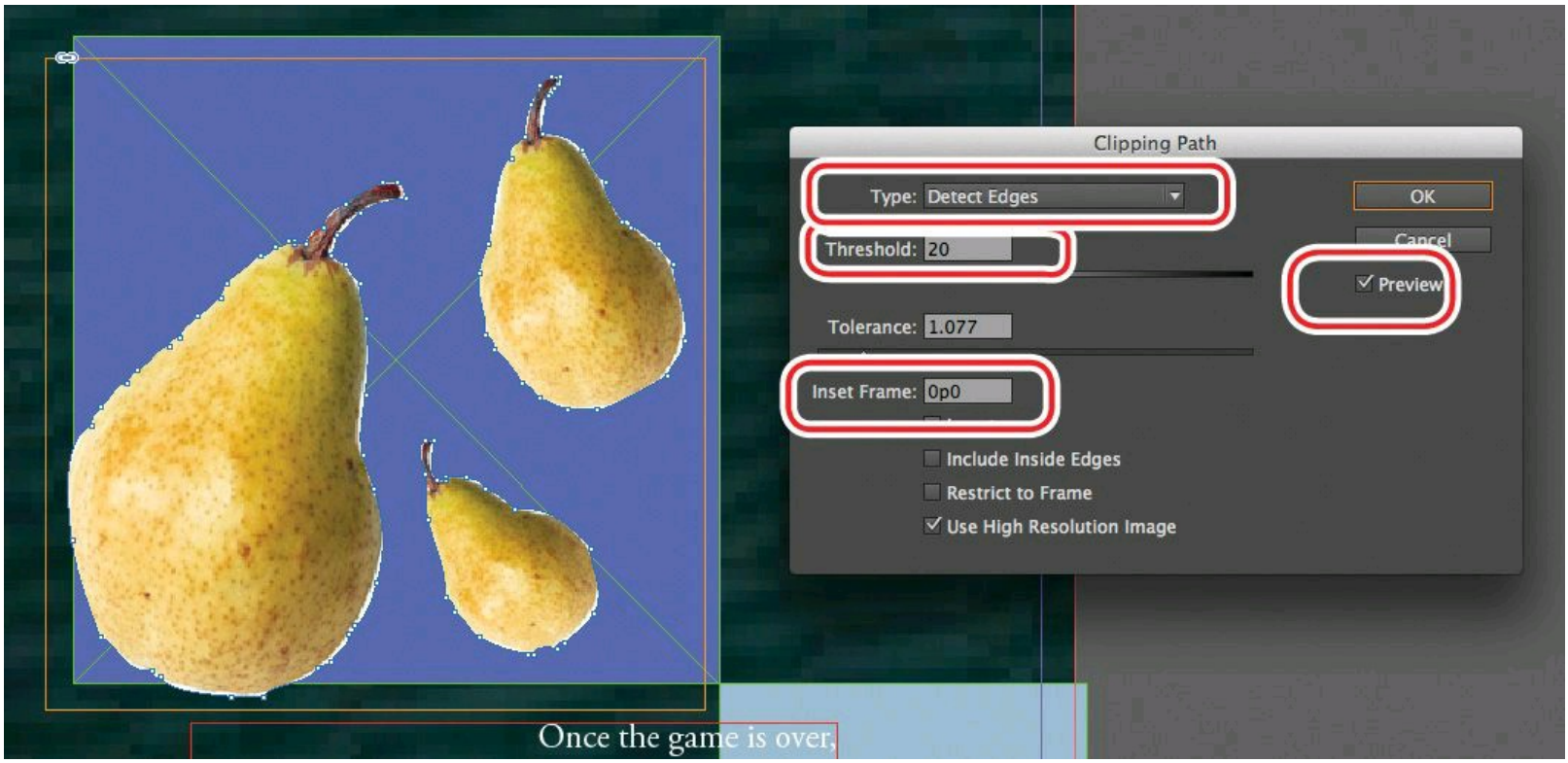
Note

If you can't find a setting that removes all of the background without affecting the subject, specify a value that leaves the entire subject visible along with small bits of the white background. You'll eliminate the remaining white background by fine-tuning the clipping path in the following steps.

6. Drag the Threshold slider until the Threshold setting hides as much of the white background as possible without hiding parts of the subject (darker areas). This example uses a Threshold value of 20.

   The Threshold setting hides light areas of the image, starting with white. As you drag to the right to choose a higher value, increasingly darker tones are included within the range of tones that become hidden. Don't try to find a setting that matches the pear perfectly. You'll learn how to improve the clipping path later.

7. Drag the Tolerance slider slightly to the left until the Tolerance value is approximately 1.



The Tolerance option determines how many points define the clipping path that's automatically generated. As you drag to the right, InDesign uses fewer points so that the clipping path fits the image more loosely (higher tolerance). Using fewer points on the path may speed up document printing but may also be less accurate.

Note

You can also use Detect Edges to remove a solid black background. Just select the Invert and Include Inside Edges options, and specify a high threshold value (255).

8. In the Inset Frame box, type a value that closes up any remaining background areas. The example below uses 0p1 (zero picas, one point). This option shrinks the current shape of the

clipping path uniformly and is not affected by the lightness values in the image. Click OK to close the Clipping Path dialog box.

Before and after applying an inset of 1 point. Notice that there's less white space around the pears after applying the inset.

9. Optionally, you can refine the clipping path manually. With the Direct Selection tool ( ), select the pear image. You can now drag individual anchor points and use the drawing tools to edit the clipping path around the pears. With images that have complex edges, magnify the document to work effectively with the anchor points.
10. Choose File > Save to save the file.

Working with alpha channels

When an image has a background that isn't solid white or black, Detect Edges may not be able to remove the background effectively. With such images, hiding the background's lightness values may also hide parts of the subject that use the same lightness values. Instead, you can use the advanced background-removal tools in Photoshop to specify transparent areas using paths or alpha channels, and then let InDesign make a clipping path from the path or alpha channel.

Note

If you place a Photoshop (.psd) file that consists of an image with a transparent background, InDesign keeps the transparency without relying on clipping paths or alpha channels. A transparent background can be especially helpful when you place an image with a soft or feathered edge.

Importing a Photoshop file with alpha channels

You imported the previous image using the Place command. This time, you will use an alternate method: dragging a Photoshop image directly onto an InDesign spread. InDesign can use Photoshop paths and alpha channels directly—you don't need to save the Photoshop file in a different file format.

1. In the Layers panel, make sure that the Photos layer is selected so that the image is placed on that layer.
2. Navigate to page 2 of your document, and choose View > Fit Page In Window.
3. Switch to Explorer (Windows) or the Finder (Mac OS), and open the Lesson10 folder, which contains the 10_d.psd file.

   Resize and arrange your Explorer window (Windows) or Finder window (Mac OS) and your InDesign window, as needed, so that you can simultaneously see the list of files in the Lesson10 folder and the InDesign document window. Make sure that the lower-left quarter of page 2 in your document is visible.

Note

When you place the file in step 4, be careful to drop it on the pasteboard area to the left of page 2. If you drop it on a preexisting frame, it is placed inside the frame. If this happens, choose Edit > Undo, and try again.

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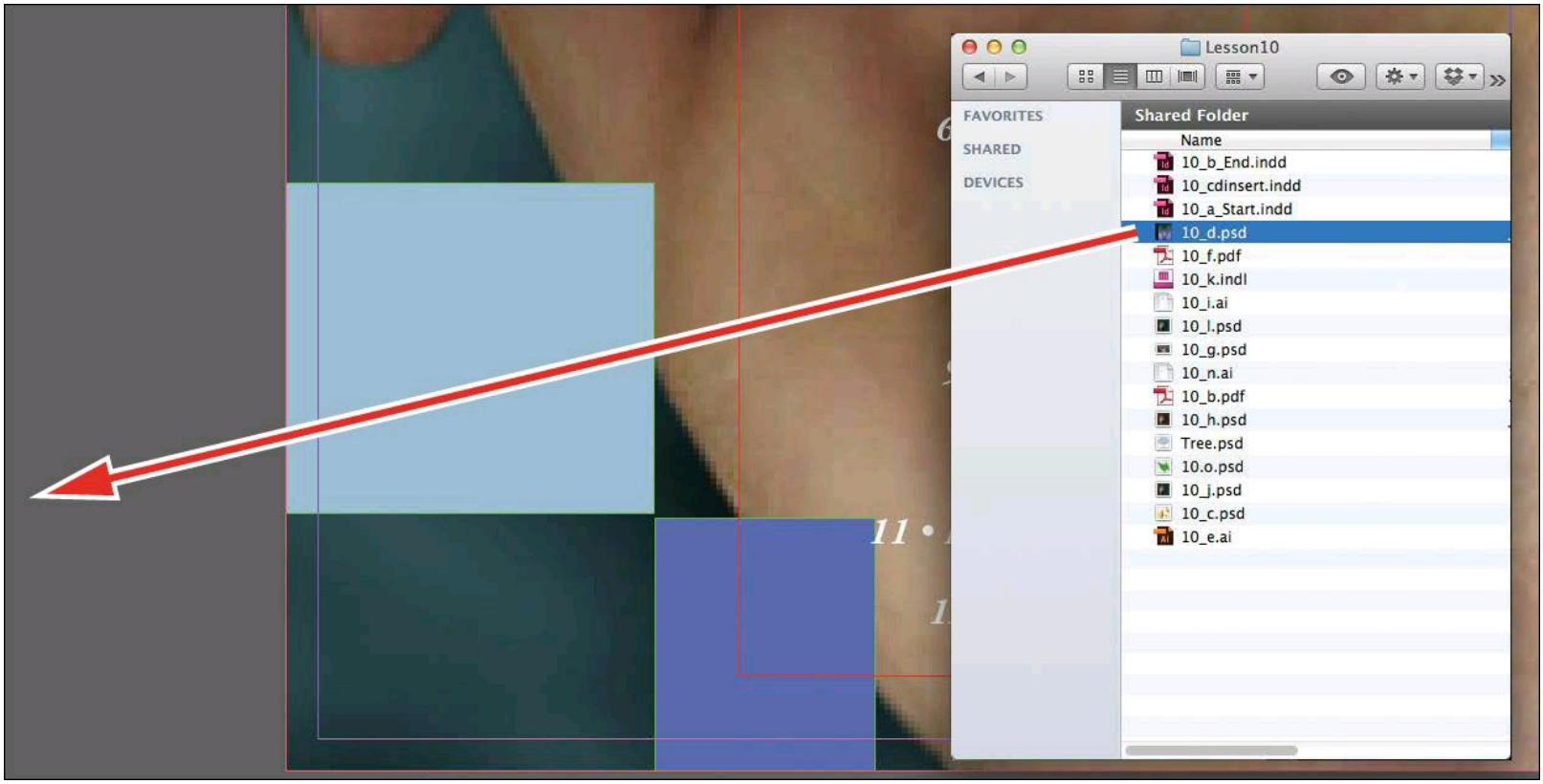
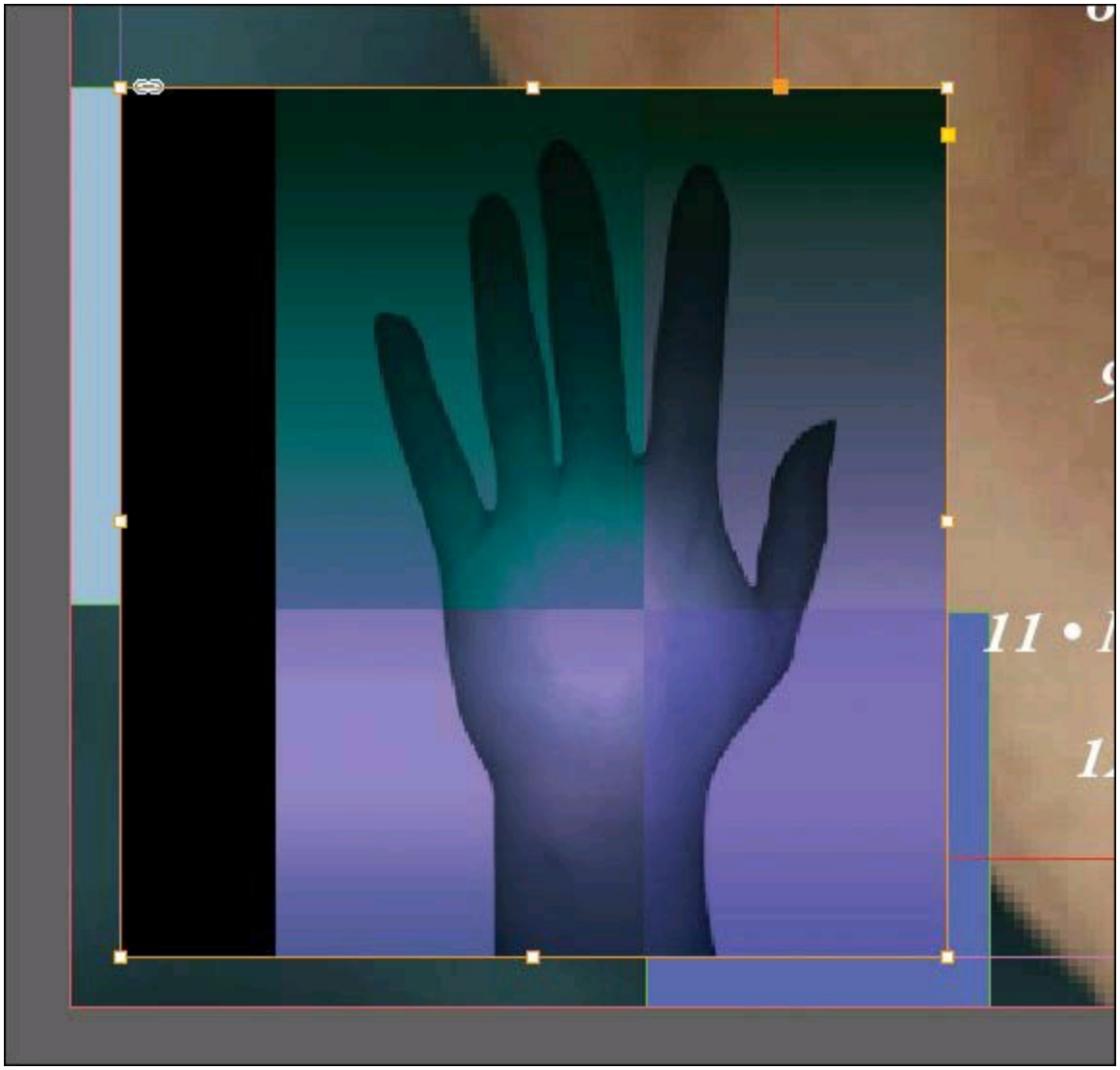
4. Drag the 10_d.psd file to the pasteboard area to the left of page 2 in the InDesign document and release the mouse. Click once on the pasteboard to return to InDesign, and click once again to place the image at full size.



5. Use the Selection tool ( ) to reposition the graphic so that it is in the lower-left corner of the page.



6. If necessary, maximize the InDesign window to its previous size. You've finished importing the file.

Examining Photoshop paths and alpha channels

In the Photoshop image that you just dragged into InDesign, the hand and the background share many of the same lightness values. Therefore, the background can't easily be isolated using the Detect Edges option in the Clipping Path dialog box.

Note

Adobe Photoshop is an image-editing application that is available to Creative Cloud users and must be installed separately. You can install Photoshop using the Creative Cloud desktop application in the task bar (Windows) or menu bar (Mac OS). You can also download Photoshop CC from the Download Center at creative.adobe.com.

Instead, you'll set up InDesign to use an alpha channel from the Photoshop image. First, you'll use the Links panel to open the image directly in Photoshop to see what paths and alpha channels it already includes.

The procedure in this topic requires that you have Photoshop installed on your system and is easier if you have enough RAM available to leave both InDesign and Photoshop open as you work. If your configuration doesn't include these two conditions, you can still read these steps to help you

understand what Photoshop alpha channels look like and do, and you can resume your work in the next section of this lesson.

1. If it's not still selected, use the Selection tool ( ) to select the 10_d.psd image you imported in the previous task.

Tip

In addition to using the Edit Original button in the Links panel to edit the selected graphic, you can choose Edit With from the Links panel menu, and then choose the application you want to use.

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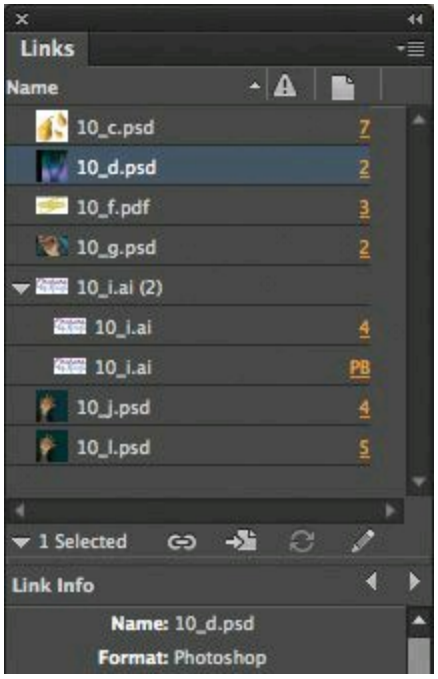
2. If the Links panel is not already open, choose Window > Links. The image filename appears selected in the Links panel.



Note

The Edit Original button may open an image in an application other than Photoshop or the application in which it was created. When you install software, some installer utilities change your operating system's settings for associating files with applications. The Edit Original command uses these settings for associating files with applications. To change these settings, see the documentation for your operating system.

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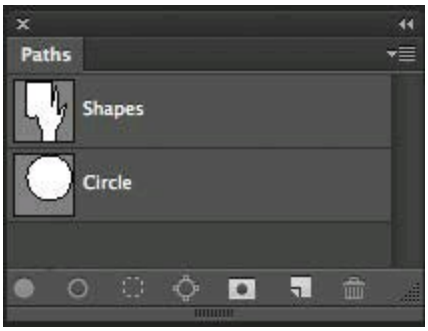
3. In the Links panel, click the Edit Original button ( ). This opens the image in an application that can view or edit it. This image was saved from Photoshop, so if Photoshop is installed on your computer, InDesign starts Photoshop and opens the selected file.
4. In Photoshop, choose Window > Channels to display the Channels panel, or click the Channels panel icon. Click the tab at the top of the Channels panel and drag the panel to the document window.
5. Lengthen the Channels panel, if necessary, to view the three alpha channels (Alpha 1, Alpha 2, and Alpha 3) in addition to the standard RGB channels. These channels were drawn using the

masking and painting tools in Photoshop.

Photoshop file saved with three alpha channels.

6. In the Channels panel in Photoshop, click Alpha 1 to see how it looks, and then click Alpha 2 and Alpha 3 to compare them.
7. Click the RGB channel.
8. In Photoshop, choose Window > Paths to open the Paths panel, or click the Paths panel icon.



The Paths panel contains two named paths, Shapes and Circle. These were drawn using the Pen tool ( ) and other path tools in Photoshop, although they could also be drawn in Illustrator and pasted into Photoshop.

9. In the Photoshop Paths panel, click Shapes to view that path, and then click Circle.
10. Quit Photoshop. You've finished using it for this lesson.

Using Photoshop paths and alpha channels in InDesign

Now you'll return to InDesign and see how you can create different clipping paths from the Photoshop paths and alpha channels.

1. Switch to InDesign. Make sure that the 10_d.psd file is still selected on the page; if necessary, select it using the Selection tool ( ).
2. With the hand image still selected, choose Object > Clipping Path > Options to open the Clipping Path dialog box. If necessary, move the Clipping Path dialog box so that you can see

the image as you work.

3. Make sure that Preview is selected, and then choose Alpha Channel from the Type menu. The Alpha menu becomes available, listing the three alpha channels you saw in Photoshop by the names used in that application.
4. In the Alpha menu, choose Alpha 1. InDesign creates a clipping path from the alpha channel. Then choose Alpha 2 from the same menu, and compare the results.

Tip

You can fine-tune the clipping path that InDesign creates from an alpha channel by adjusting the Threshold and Tolerance options, as you did in "Removing a white background using InDesign" earlier in this lesson. For alpha channels, start with a low Threshold value, such as 1.

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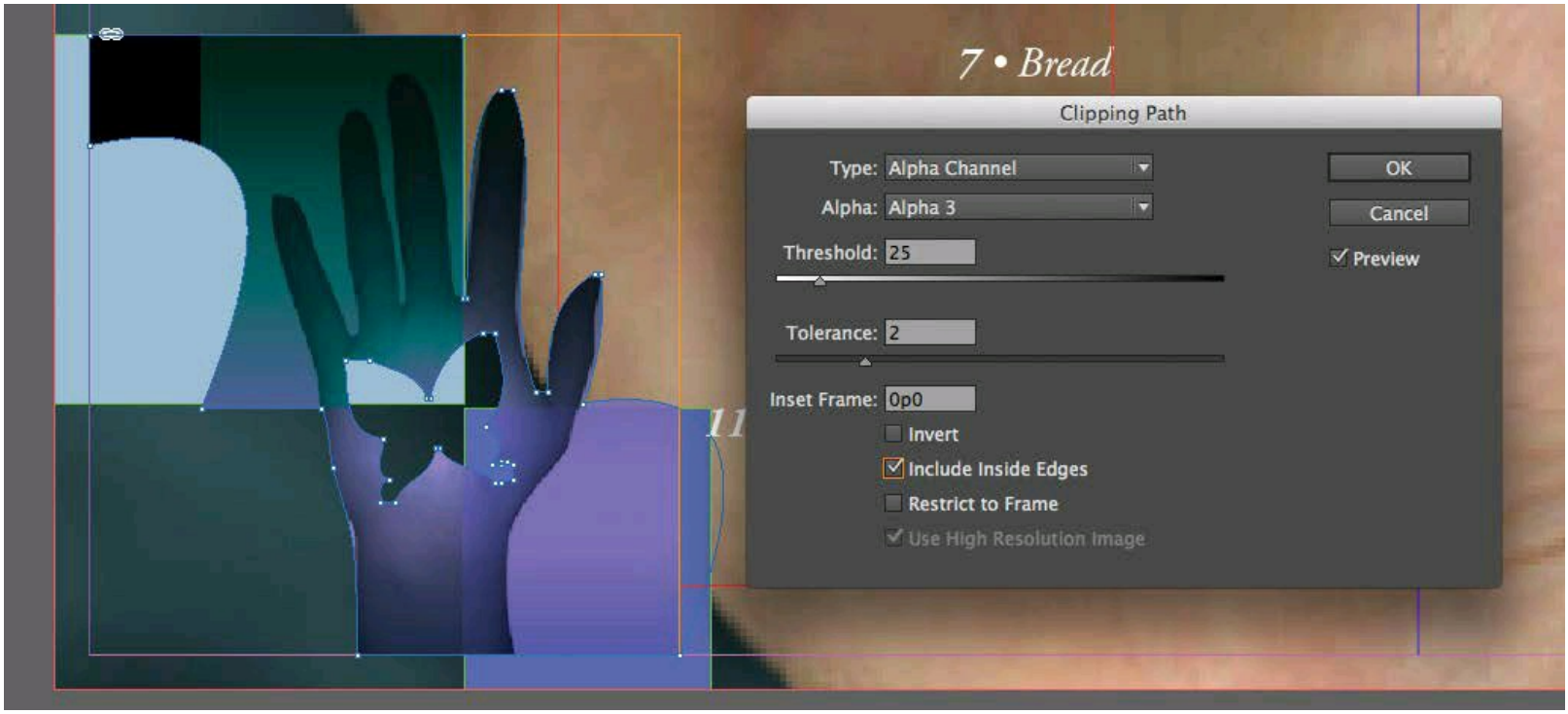
5. Choose Alpha 3 from the Alpha menu, and then select the Include Inside Edges option. Notice the changes in the image.

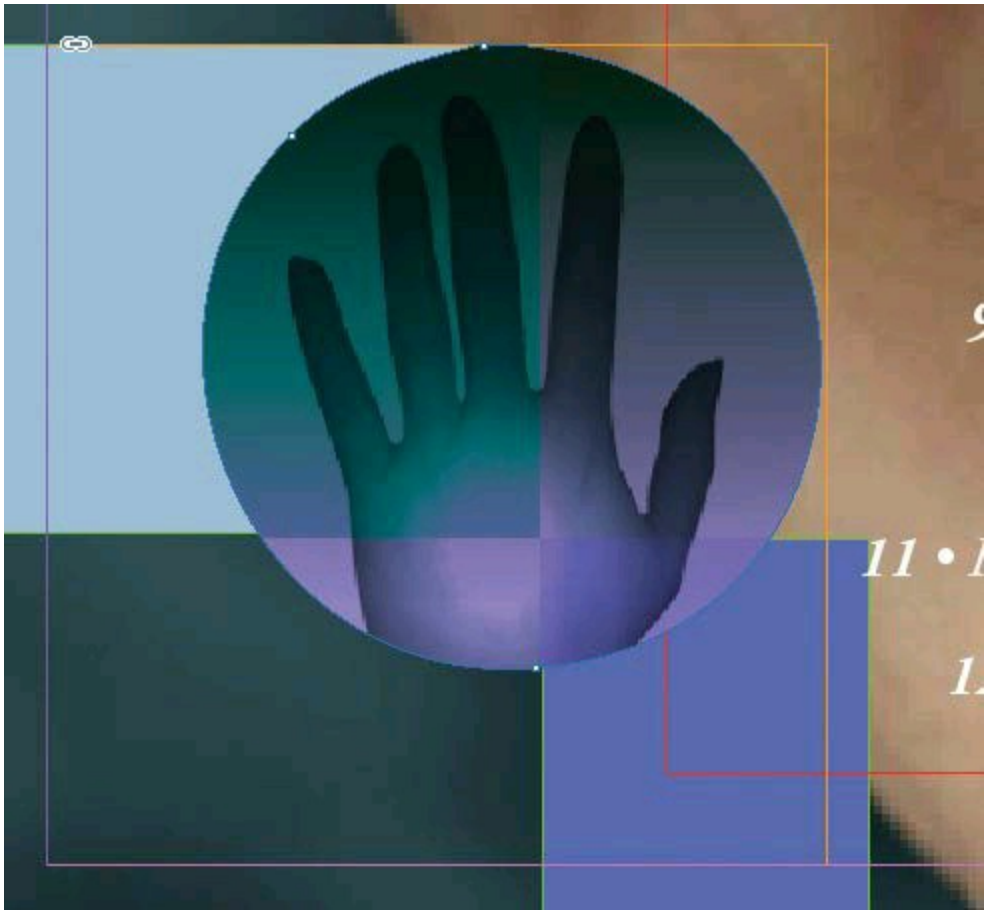


Tip

You can see how the butterfly-shaped hole looks in Photoshop by displaying the Alpha 3 channel in the original Photoshop file.

Selecting the Include Inside Edges option makes InDesign recognize a butterfly-shaped hole painted in the Alpha 3 channel and adds it to the clipping path.

6. Choose Photoshop Path from the Type menu, and then choose Shapes from the Path menu. InDesign reshapes the frame of the image to match the Photoshop path.
7. Choose Circle from the Path menu. Click OK.



8. Choose File > Save to save the file.

Importing native Adobe graphics files

InDesign allows you to import native Adobe files such as Photoshop, Illustrator, and Acrobat in unique ways and provides options for controlling how the file is displayed. For example, you can adjust the visibility of Photoshop layers in InDesign, as well as view different layer comps. Similarly, if you import a layered Illustrator file into an InDesign layout, you can vary the illustration by adjusting layer visibility.

Importing a Photoshop file with layers and layer comps

In the previous exercise, you worked with a Photoshop file with saved paths and alpha channels; however, the file had only a single background layer. When you work with a layered Photoshop file, you can adjust the visibility of the individual layers. Additionally, you can view different layer comps.

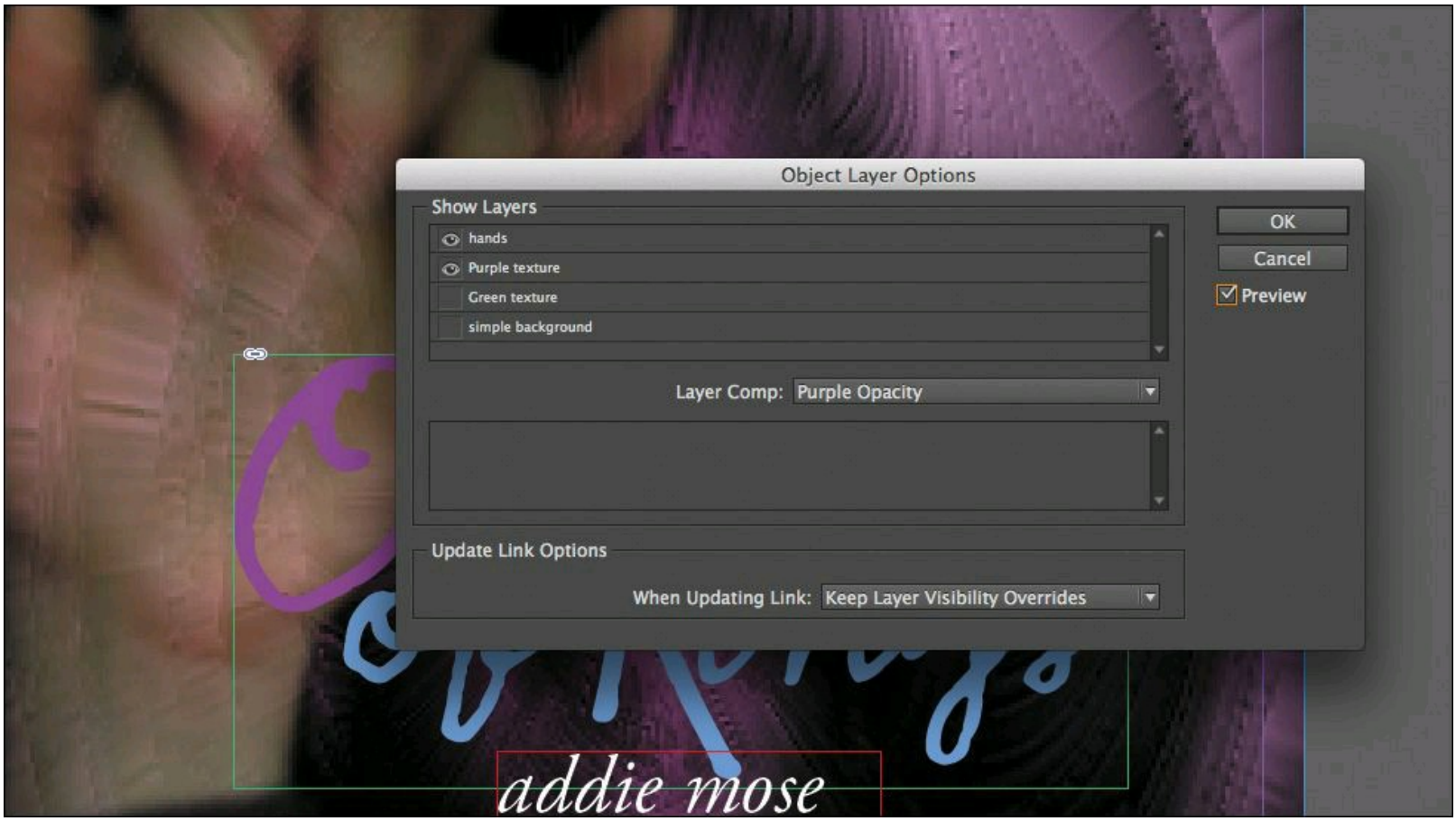
Created in Photoshop and saved as part of the file, layer comps are often used to make multiple compositions of an image to compare different styles or artwork. When the file is placed in InDesign, you can preview the different comps in relation to your entire layout. You'll view some layer comps now.

1. In the Links panel, click the link for 10_j.psd, and click the Go To Link button ( ) to select the file and center it in your document window. This file, which you relinked in a previous exercise, has four layers and three layer comps.
2. Choose Object > Object Layer Options to open the Object Layer Options dialog box. This dialog box allows you to show and hide layers and to switch among layer comps.
3. Move the Object Layer Options dialog box so that you can see as much as possible of the

selected image. Select the Preview option to allow you to view changes while keeping the dialog box open.

4. In the Object Layer Options dialog box, click the eye icon ( ) to the left of the Hands layer. This turns off the Hands layer, leaving only the Simple Background layer visible. Click the square next to the Hands layer to turn visibility back on.

5. Choose Green Glow from the Layer Comp menu. This layer comp has a different background. Now choose Purple Opacity from the Layer Comp menu. This layer comp has a different background, and the Hands layer is partially transparent. Click OK.



Layer comps are not merely an arrangement of different layers but are able to save Photoshop layer effects, visibility, and position values. When the visibility of a layered file is modified, InDesign informs you in the Link Info section of the Links panel.

6. In the Links panel, select the 10_j.psd graphic, and click the Show/Hide Link Information button ( ) to display the Link Info section at the bottom of the panel if it is not already visible. Locate the Layer Overrides listing. "Yes (2)" is displayed for Layer Overrides to let you know that two layers are overridden. "No" is displayed when there are no layer overrides.

7. Choose File > Save to save your work so far.

Creating an anchored graphics frame

An anchored graphics frame flows with text. In this exercise, you'll anchor the album logo to a text frame on page 6.

1. In the Pages panel, double-click the second spread and choose View > Fit Spread In Window. Scroll down if necessary. At the bottom of the pasteboard is the Orchard of Kings logo. You'll insert this graphic into a paragraph in the page.

2. Using the Selection tool ( ), click the logo. (Be careful to click outside the content grabber so you select the frame and not the graphic within.) Notice the small green square near the upper-right corner of the frame. You can drag this square into a text frame to anchor an object to text.

Tip

If the Anchored Object Control square is not visible when selecting the logo, choose View > Extras > Show Anchored Object Control.

Note

Showing hidden characters is not a necessary step when placing anchored graphics; it is used here to help identify the structure of the text.

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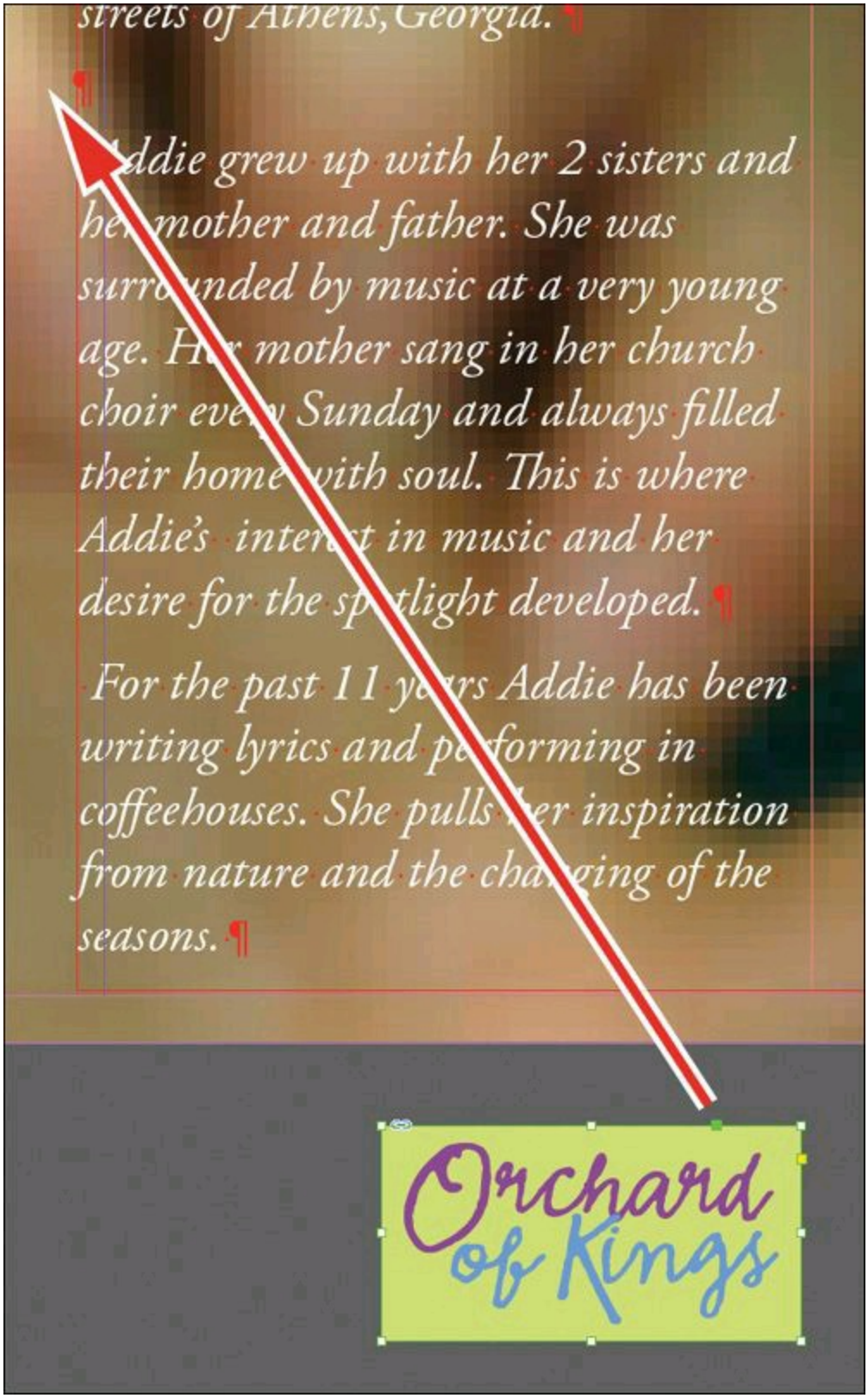
3. Press and hold Z to temporarily access the Zoom tool, or select the Zoom tool ( ) and click so that you can see the logo and the text frame above it. This exercise uses 150 percent.
4. Choose Type > Show Hidden Characters to view the spaces and paragraph returns in the text. This helps you locate where you want to anchor the frame.
5. Hold down the Shift key, and then drag the green square near the upper-right corner of the graphics frame to the left of the second paragraph return below the word “streets.” Holding the Shift key creates an inline graphic between the two paragraphs of text. Notice that the text after the graphic reflows when the image is placed.

   Now you’ll create space between the graphic and the surrounding text with the Space Before option.



6. Select the Type tool ( ) and then click to the right of the inline graphic to establish the insertion point in that paragraph.
7. Click the Paragraph Formatting Controls button ( ) in the Control panel. In the Space Before option ( ), click the Up Arrow button to change the value to 0p4. As you increase the value, the anchored graphics frame and the text below it shift downward slightly.

8. Choose File > Save to save your work so far.

Adding text wrap to an anchored graphics frame

You can easily add text wrap to an anchored graphics frame. Text wrap allows you to experiment with different layouts and see the results immediately.

1. Using the Selection tool ( ), select the graphics frame with the Orchard of Kings logo you placed in the previous exercise.
2. Press Shift+Ctrl (Windows) or Shift+Command (Mac OS), and drag the upper-right handle of the frame up and to the right until you've scaled the graphic roughly 25% across the second column. The key combination lets you proportionally scale the graphic and resize the frame simultaneously.

3. Choose Window > Text Wrap to access the Text Wrap panel. Even though the graphic is anchored to the text, it is placed beneath the existing text.

4. In the Text Wrap panel, select Wrap Around Object Shape ( ) to add text wrap to the graphic.

5. To increase space around the bounding box of the graphic, click the Up Arrow button in the Top Offset option ( ) and change the value to 1p0.

Text can also wrap around a graphic's shape rather than the rectangular bounding box.

6. To see this more clearly, click the gray pasteboard to deselect all objects, and then click back on the Orchard of Kings logo. Press the Forward Slash key (/) to apply no fill color.

7. In the Text Wrap panel, choose Detect Edges from the Type menu. Because this image is a vector graphic, the text wrap is determined by the shape formed by the letters.

8. To view the document clearly, click the gray pasteboard to deselect the graphic, and choose Type > Hide Hidden Characters to hide the paragraph returns and spaces.
9. Using the Selection tool ( ), select the graphics frame with Orchard of Kings logo again.
10. In the Text Wrap panel, choose these options from the Wrap To menu in turn:
    - Right Side. The type moves to the right side of the image, avoiding the area just below the image, even though there is space for it to display beneath the text wrap boundary.
    - Both Right & Left Sides. The type moves into all available areas around the image. You'll notice that a small break in the type appears where the text wrap boundary drops into the type area.
    - Largest Area. The text moves into the largest area to one side of the text wrap boundary. Keep this as your final choice.
11. Optionally, select the Direct Selection tool ( ), and then click the graphic to view the anchor points used for the text wrap. When using the Detect Edges contour option, you can manually adjust the anchor points that define the text wrap by clicking the anchor points and dragging them to a new position.
12. Close the Text Wrap panel.
13. Choose File > Save.

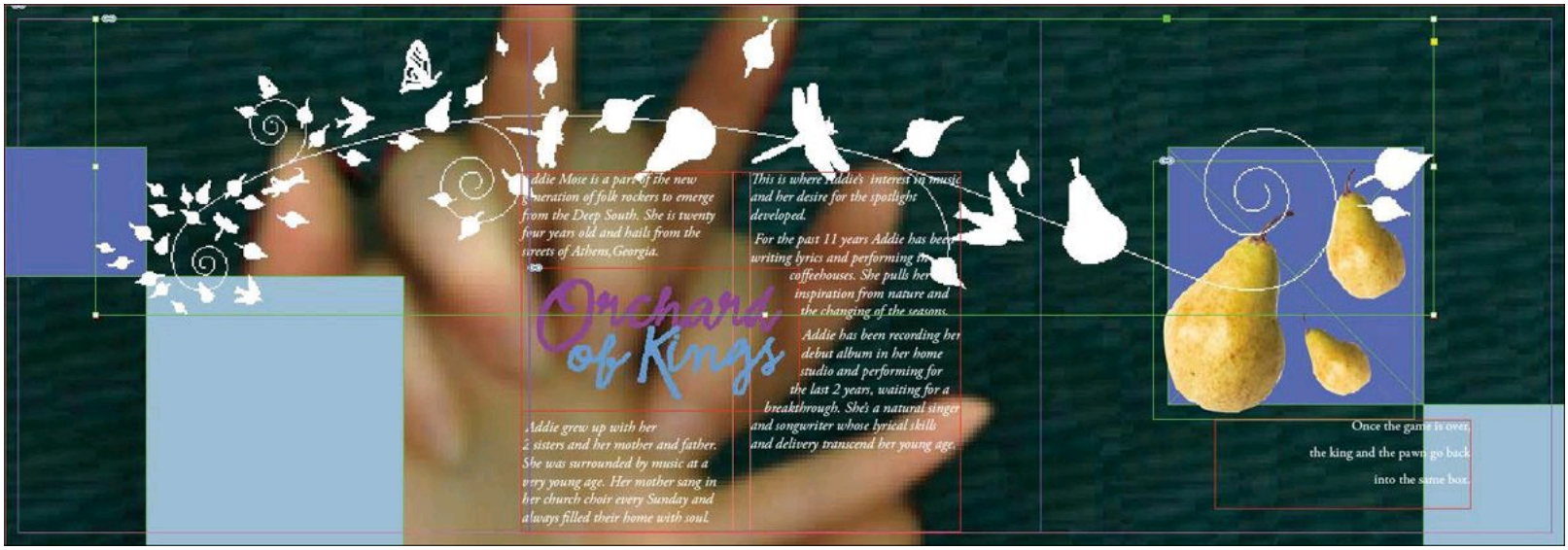
Importing an Illustrator file

InDesign takes full advantage of the smooth edges of vector graphics, such as those from Adobe Illustrator. When you use high-quality screen display, vector graphics and type appear with smooth edges at any size or magnification. Most vector graphics don't require a clipping path, because most applications save them with transparent backgrounds. In this section, you'll place an Illustrator graphic into your InDesign document.

1. In the Layers panel, select the Graphics layer. Choose Edit > Deselect All to make sure nothing

is selected in your document.

2. Choose View > Fit Spread In Window to see the entire spread.
3. Choose File > Place and select the Illustrator file 10_e.ai from the Lesson10 folder. Make sure that Show Import Options is not selected. Click Open.
4. Click in the upper-left corner of page 5 with the loaded graphics icon ( ) to add the Illustrator file to the page. Use the Selection tool to position it as shown below. Graphics created in Illustrator have transparent backgrounds by default.

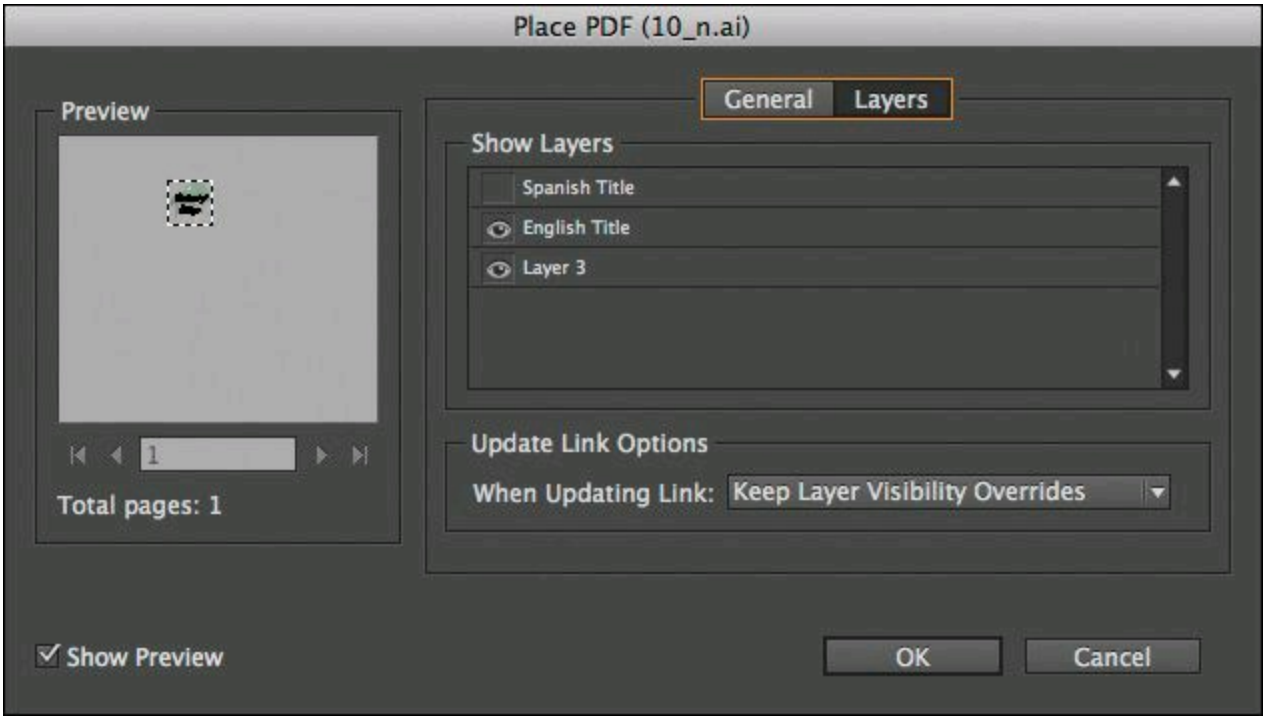


5. Choose File > Save to save your work.

Importing an Illustrator file with layers

You can import native Illustrator files with layers into an InDesign layout and control the visibility of the layers and reposition the graphic; however, you cannot edit the paths, objects, or text.

1. Deselect all objects by clicking in the pasteboard of the document window.
2. Choose File > Place. In the lower-left corner of the Place dialog box, select Show Import Options. Select the file 10_n.ai and click Open. The Place PDF dialog box appears when Show Import Options is selected.
3. In the Place PDF dialog box, make sure that Show Preview is selected. In the General section, choose Bounding Box (All Layers) from the Crop To menu and make sure that Transparent Background is selected.
4. Click the Layers tab to view the layers. This file has three layers: a background image of trees (Layer 3), a layer of text in English (English Title), and a layer of text in Spanish (Spanish Title).



Although you can designate now which layers you would like to display in the imported graphic, the small Preview area makes it difficult to see the results.

5. Click OK. You'll select the layers to display in the layout itself.

6. With the loaded graphics icon (), position the cursor to the left of the large blue box on page 5. Do not position the loaded graphics icon within the blue box, because it inserts the graphic into that frame. Click once to place the graphic and then use the Selection tool () to position the graphic so that it is visually centered over the blue box.

7. Use the Zoom tool () to zoom in on the graphic.

8. With the graphic still selected, choose Object > Object Layer Options. Move the dialog box if necessary so that you can see the graphic in the document.

9. Select Preview, and then click the eye icon () next to the English Title layer to turn it off. Now click the empty box next to Spanish Title to turn on that layer. Click OK, and then deselect the graphic by clicking the gray pasteboard.

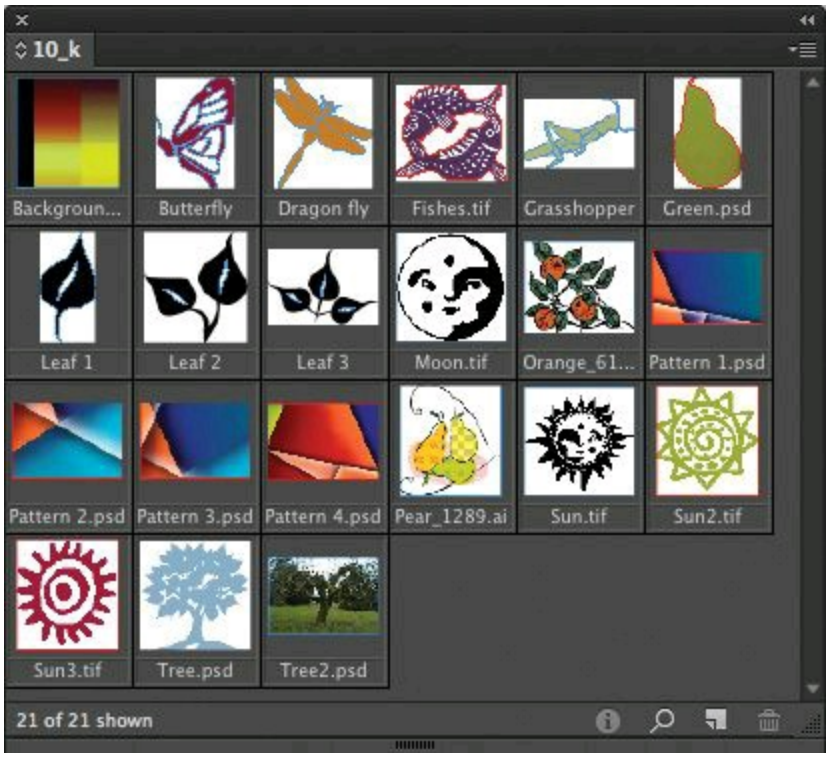
Using layered Illustrator files allows you to repurpose illustrations without having to create separate files for each variation.

10. Choose File > Save to save your work.

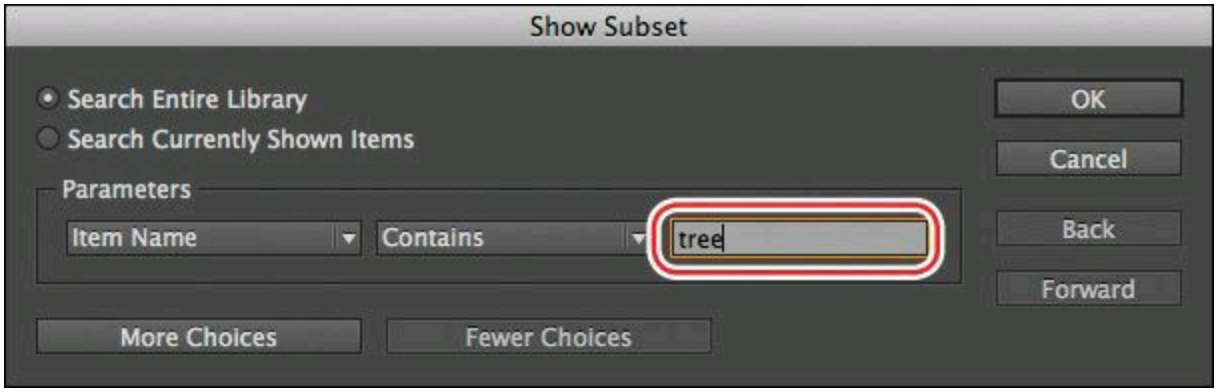
Using a library to manage objects

Object libraries let you store and organize graphics, text, and design elements that you frequently use. Libraries are stored as files on your hard drive. You can also add ruler guides, grids, drawn shapes, and grouped images to a library. Each library appears as a separate panel that you can group with other panels any way you like. You can create as many libraries as you need—for example, different libraries for each of your projects or clients. In this section, you'll import a graphic currently stored in a library, and then you'll create your own library.

1. If you're not already on page 5, type **5** into the Page Number box at the bottom of the document window, and then press Enter or Return to go to that page.
2. Choose View > Fit Page In Window to see the entire page.
3. Choose File > Open, select the file 10_k.indl in the Lesson10 folder, and then click Open to open the library file. Drag the lower-right corner of the 10_k Library panel to reveal all of the items it contains.



4. In the 10_k Library panel, select the Show Library Subset button (). In the last box for the Parameters option, type **tree**, and click OK. This searches the library for all objects that have the word "tree" in their name. Two objects are found.



5. In the Layers panel, make sure the Graphics layer is targeted. Open the Links panel.

Note

After you drag the tree image onto the page, the Links panel may display a missing link icon ( ) or a modified link icon ( ) because you copied the Tree.psd file from its original location to your hard drive. To remove the warning, click the Update Link button in the Links panel or click the Relink button in the Links panel and navigate to the Lesson10 folder to find Tree.psd.

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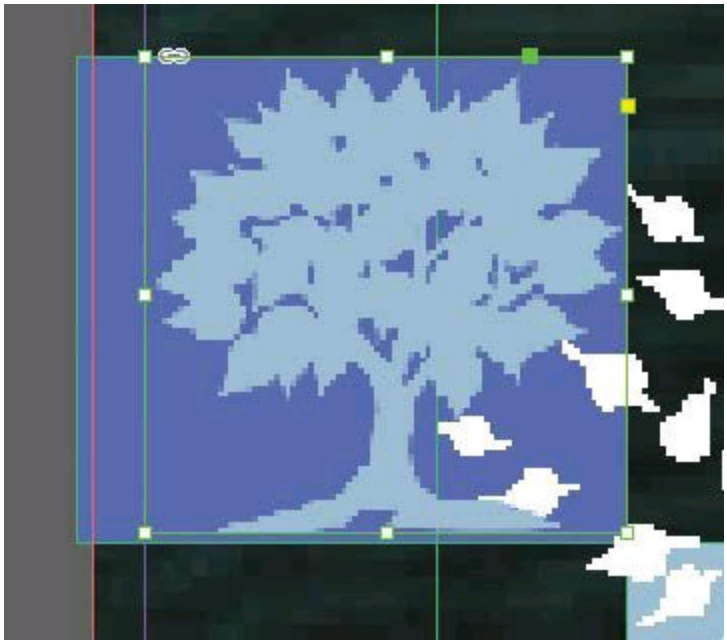
6. Of the two objects visible in the 10_k Library panel, drag Tree.psd anywhere on page 5. The file is added to the page. Notice that the filename appears in the Links panel.
7. Using the Selection tool ( ), position the Tree.psd image so that the top and right edges of the frame align with the top and right edges of the background frame.



Creating a library

Now you'll create your own library and add text and a graphic to it. When adding a graphic to an InDesign library, the original file is not copied into the library; InDesign maintains a link to the original source file. Graphics stored in a library still require the original, high-resolution file for printing.

1. Choose File > New > Library. Type **CD Projects** as the library filename, navigate to the Lesson10 folder, and click Save. The library is displayed in the same panel group as the library

you opened earlier.

Using snippets

A snippet is a file that holds objects and describes their location relative to one another on a page or page spread. Use snippets to conveniently reuse and position page objects. Create a snippet by saving objects in a snippet file, which has the .IDMS extension. (Previous InDesign versions use the .INDS extension.) When you place the snippet file in InDesign, you can determine whether the objects land in their original positions or where you click. You can store snippets in an object library and Adobe Bridge as well as on your hard disk.

When a snippet contains resource definitions and these definitions are also present in the document to which it is copied, the snippet uses the resource definitions in the document.

Snippets you create in InDesign cannot be opened in previous versions of InDesign.

To create a snippet, do one of the following:

- Using a selection tool, select one or more objects, and then choose File > Export. From the Save As Type (Windows) or Format (Mac OS) menu, choose InDesign Snippet. Type a name for the file and click Save.
- Using a selection tool, select one or more objects, and then drag the selection to your desktop. A snippet file is created. Rename the file.
- Drag an item from the Structure panel (View > Structure > Show Structure) to your desktop.

To add a snippet to a document:

1. Choose File > Place.
2. Select one or more snippet (.IDMS or .INDS) files, and then click Open.
3. Click the loaded snippet cursor where you want the upper-left corner of the snippet file to be.

   If you placed the insertion point in a text frame, the snippet is placed in the text as an anchored object.

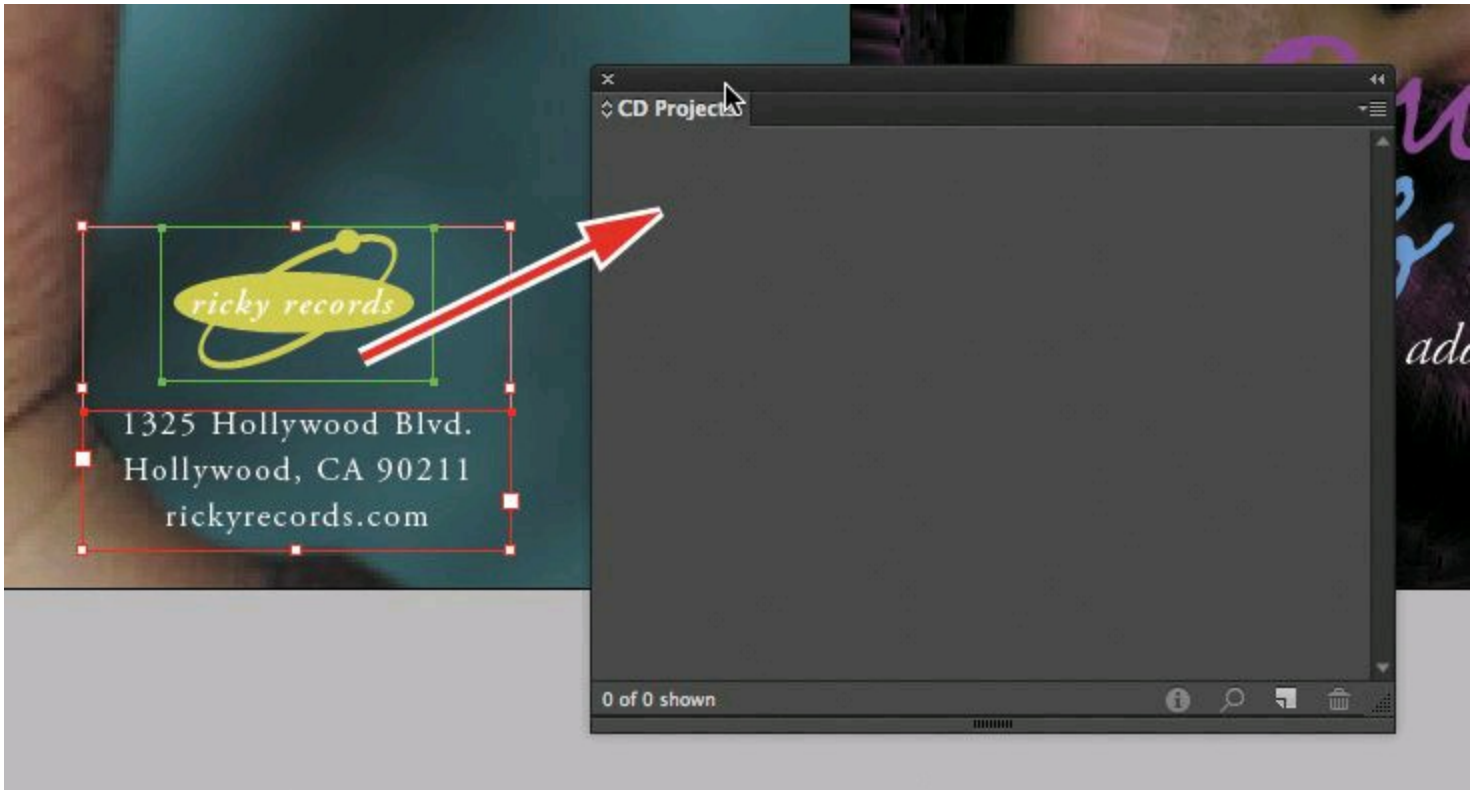
   All objects remain selected after you place the snippet. By dragging, you can adjust the position of all objects.
4. If you loaded more than one snippet, change the snippet that is loaded in the cursor by pressing the arrow keys, and click the loaded snippet cursor to place the currently selected snippet.

Rather than place snippet objects according to where you click on a page, you can place them in their original locations. For example, a text frame that appeared in the middle of a page when it was made part of a snippet can appear in the same location when you place it as a snippet.

- In File Handling, choose Position At Original for Snippet Import to preserve objects' original locations in snippets; choose Position At Cursor Location to place snippets according to where you click on a page.

—From InDesign Help

2. Navigate to page 3. Using the Selection tool ( ), drag the Ricky Records logo to the library you just created. The logo is now saved in the library for use in other InDesign documents.



Tip

If you Alt-drag (Windows) or Option-drag (Mac OS) an object into a library, the Item Information dialog box appears, and you can assign a name to the object.

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3. In the CD Projects library, double-click the Ricky Records logo. For Item Name, type **Logo**, and click OK.
4. Using the Selection tool, drag the address text block to the CD Projects library.
5. In the CD Projects library, double-click the address text block. For Item Name, type **Address**, and click OK.

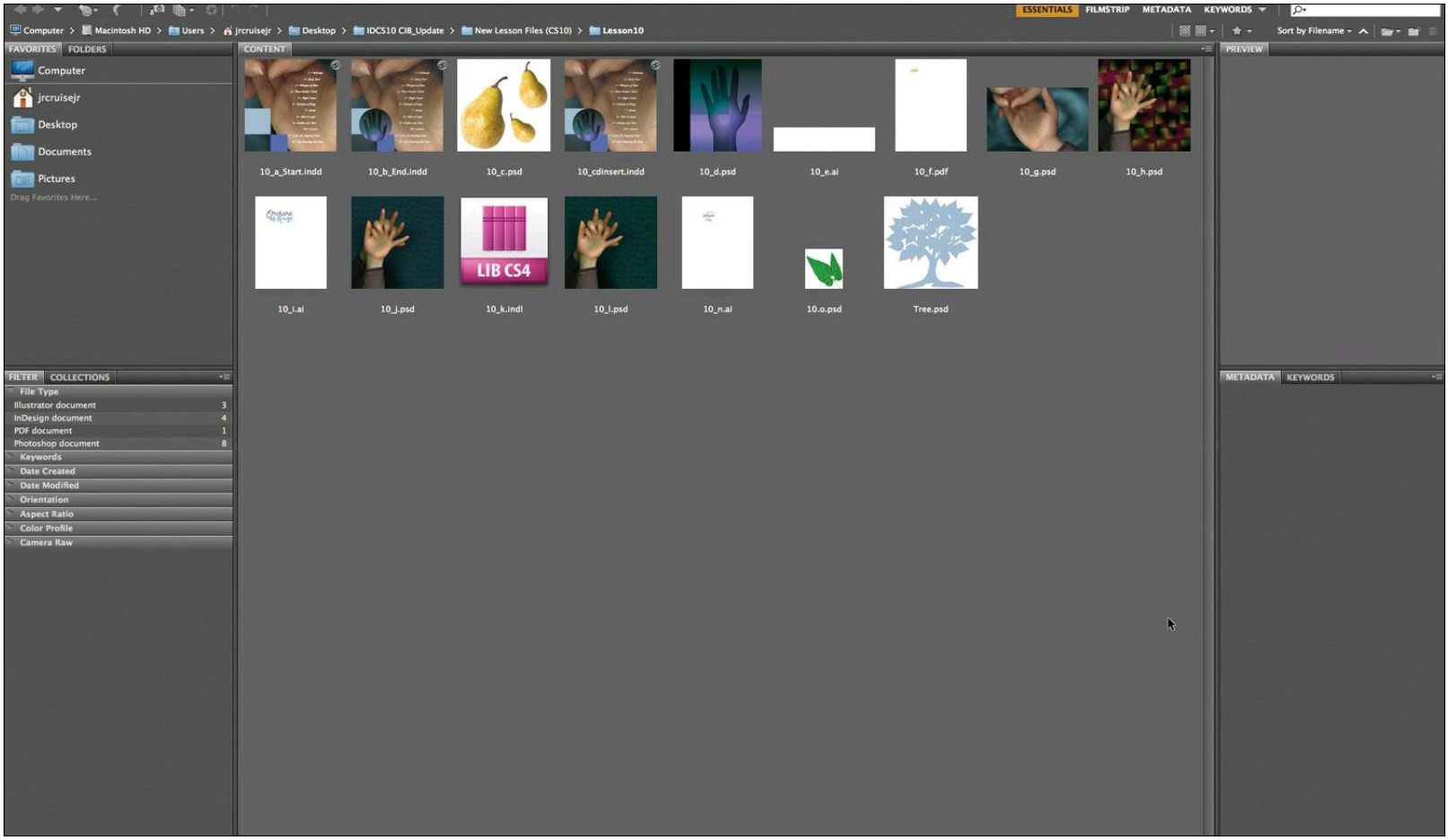
Now your library contains both text and graphics. As soon as you make changes to the library, InDesign saves the changes.

6. Close both libraries by clicking the close button at the top of the library panel group, and choose File > Save.

Using Adobe Bridge to import graphics

Adobe Bridge is a separate application that is available to Creative Cloud users. A cross-platform application, Adobe Bridge lets you browse your local and networked computers for images and then place them into an InDesign layout. This is just one of many features the application provides. (If you don't have a copy of Bridge installed, you can complete this section using the Place command in the File menu.

1. Choose File > Browse In Bridge to launch Adobe Bridge. The Content area displays thumbnails of the files in the folder in which the InDesign document you're currently working on is stored.



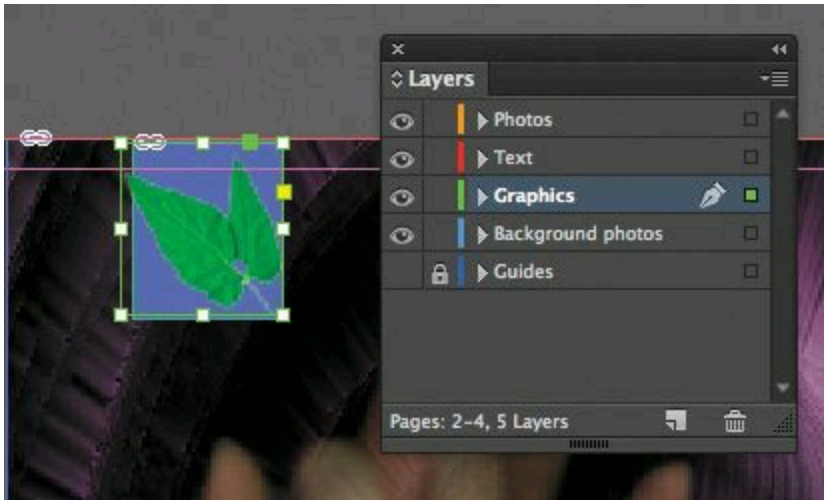
Adobe Bridge lets you view the thumbnails of all of your images.

2. Adobe Bridge provides an easy way to locate and rename files. Click the graphic named 10_o.psd once, then click once on the filename to select the filename box. Rename the file **Leaf.psd,** and press Enter or Return to commit to the change.

3. Make the Bridge window smaller by dragging the lower-right corner, and position it so that you can see page 4 of the InDesign document. Drag the Leaf.psd file into your InDesign document and onto an open area of the pasteboard. Click once within the layout to return to InDesign, then click on an empty area of the pasteboard again to place the graphic.

4. Use the Selection tool ( ) to position the leaf graphic in the upper-left corner of page 4, on top of the purple box.

5. Open the Layers panel. The graphic is placed on the Text layer because that's the last layer you worked on. Drag the small colored square on the right side of the panel to the Graphics layer.



After importing graphics files into InDesign, you can easily locate and access the original files by taking advantage of the integration of Adobe Bridge and Adobe InDesign.

6. Select the Leaf.psd file in the Links panel. Then right-click (Windows) or Control-click (Mac OS) the link, and from the context menu, choose Graphics > Reveal In Bridge.

This action switches you from InDesign to Adobe Bridge and selects the Leaf.psd file.

7. Return to InDesign and save the file.

Congratulations! You've created a three-panel brochure for a CD by importing, updating, and managing graphics from several different graphics file formats.

Exploring on your own

Now that you've had some practice working with imported graphics, here are some exercises to try on your own.

1. Place different file formats with Show Import Options selected in the Place dialog box, and see what options appear for each format. For a full description of all of the options available for each format, see InDesign Help.
2. Place a multiple-page PDF file or an Adobe Illustrator (.ai) file with multiple artboards with Show Import Options selected in the Place dialog box, and import different pages from the PDF or different artboards from the Illustrator file.
3. Create libraries of text and graphics for your work.

Review questions

1. How can you determine the filename of an imported graphic in your document?
2. What are the four options in the Type menu in the Clipping Path dialog box, and what must an imported graphic contain for each option to work?
3. What is the difference between updating a file's link and relinking the file?
4. When an updated version of a graphic becomes available, how do you make sure that it's up to date in your InDesign document?

Review answers

1. Select the graphic, and then choose Window > Links to see if the graphic's filename is highlighted in the Links panel. The graphic appears in the Links panel if it was imported by choosing File > Place or dragged into the layout from Explorer (Windows), Finder (Mac OS), Bridge, or Mini-Bridge.
2. The Clipping Path dialog box (Object > Clipping Path > Options) in InDesign lets you create a clipping path from an imported graphic by using
   - The Detect Edges option when a graphic contains a solid white or solid black background.
   - The Alpha Channel option when a graphic contains one or more alpha channels.
   - The Photoshop Path option when a Photoshop file contains one or more paths.
   - The User-Modified Path option, which is displayed if the selected clipping path has been modified.
3. Updating a file's link simply uses the Links panel to update the onscreen representation of a graphic so that it represents the most recent version of the original. Relinking a selected graphic uses the Place command to insert a different graphic in place of the selected graphic. If you want to change any of a placed graphic's import options, you must replace the graphic.
4. In the Links panel, make sure that no alert icon is displayed for the file. If an alert icon appears, you can simply select the link and click the Update Link button. If the file has been moved, you

can locate it again using the Relink button.

11. Creating Tables

Lesson Overview

In this lesson, you'll learn how to do the following:

- Convert text to a table, import tables from other applications, and create tables from scratch.
- Change the number of rows and columns.
- Rearrange rows and columns.
- Adjust row and column sizes.
- Format tables with strokes and fills.
- Specify repeating header and footer rows for long tables.
- Place graphics in table cells.
- Create and apply table and cell styles.

This lesson will take about 45 minutes to complete.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the "Getting Started" section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.

GREENTOWN
Community
College

Summer Schedule

ASSOCIATE DEGREE COURSES

Department	Course No.	Course Name	Credits
Art	102	Survey of Studio Art	3
Art	205	Fundraising for the Arts	2
Business	235	Principles of Marketing	3
Communications	101	Introduction to Journalism	4
Communications	211	Media Writing	3
Communications	222	Video Production	3
Computers	215	Web Content Development	3
Education	103	Foundations of Education	3
English	112	Composition and Literature	3
English	221	Creative Writing	2
Geography	111	World Geography	3
History	151	World Civilizations	4
Humanities	111	Introduction to the Humanities	3
Math	125	Math for Liberal Arts	3
Math	130	Introductory Statistics	3
Philosophy	100	Critical Thinking	3
Psychology	111	General Psychology	3
Psychology	201	Abnormal Psychology	3
Science	125	Meteorology	4

Indicates off-site course.

With InDesign, you can easily create tables, convert text to tables, or import tables from other applications. Rich formatting options—including headers, footers, and alternating row and column

patterns—can be saved as table and cell styles.

Getting started

In this lesson, you'll work on a fictional college flyer designed to be attractive, easy to use, and easy to revise. You'll convert text to a table, and then format the table using options in the Table menu, Control panel, and the Table panel. The table will include header rows that repeat when the table flows across multiple pages. Finally, you will create a table style and a cell style so the formatting can be quickly and consistently applied to other tables.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

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1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.
2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced.
3. Choose File > Open, and open the 11_Start.indd file, in the Lesson11 folder, located inside the Lessons folder within the InDesignCIB folder on your hard disk. If the Missing Fonts dialog box displays, click Sync Fonts.
4. Choose File > Save As, name the file **11_Tables.indd**, and save it in the Lesson11 folder.
5. To see what the finished document will look like, open the 11_End.indd file in the same folder. You can leave this document open to act as a guide as you work. When you're ready to resume working on the lesson document, click the 11_Tables.indd tab in the upper-left corner of the document window.

GREENTOWN Community College

Summer Schedule

ASSOCIATE DEGREE COURSES

Department	Course No.	Course Name	Credits
Art	102	Survey of Studio Art	3
Art	205	Fundraising for the Arts	2
Business	235	Principles of Marketing	3
Communications	101	Introduction to Journalism	4
Communications	211	Media Writing	3
Communications	222	Video Production	3
Computers	215	Web Content Development	3
Education	103	Foundations of Education	3
English	112	Composition and Literature	3
English	221	Creative Writing	2
Geography	111	World Geography	3
History	151	World Civilizations	4
Humanities	111	Introduction to the Humanities	3
Math	125	Math for Liberal Arts	3
Math	130	Introductory Statistics	3
Philosophy	100	Critical Thinking	3
Psychology	111	General Psychology	3
Psychology	201	Abnormal Psychology	3
Science	125	Meteorology	4

Indicates off-site course.

1

Converting text to a table

Tables are grids of individual cells set in vertical columns and horizontal rows. Often, the text for a

table already exists in the form of "tab-delimited text," in which the columns of information are separated by tab characters and the rows of information are separated by paragraph returns. In this case, the catalog text was received in an email from the college and then pasted into the document. You will select this text and convert it to a table.

Tip

You will use the Type tool for all table creation, formatting, and editing tasks.

Note

As you work through this lesson, change the view scale to suit your monitor and vision.

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1. Using the Type tool ( ), click in the text frame starting with the words "ASSOCIATE DEGREES COURSES."
2. Choose Edit > Select All.

3. Choose Table > Convert Text To Table.

In the Convert Text To Table dialog box, you will indicate how the selected text is currently separated. Because Hidden Characters (Type menu) are showing, you can see that the columns of information are separated by tabs (») and that the rows are separated by paragraph returns (¶).

Tip

If a table style is already created in a document, you can select it while converting text to a table. This produces an automatically formatted table.

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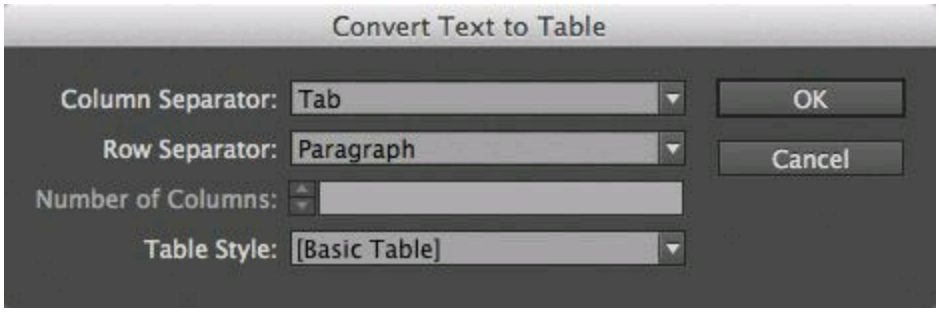
4. From the Column Separator menu, choose Tab. From the Row Separator menu, choose Paragraph. Click OK.



The new table is automatically anchored in the text frame that contained the text. In InDesign, tables are always anchored in text.

5. Choose File > Save.

Importing tables

InDesign can import tables from other applications, including Microsoft Word and Microsoft Excel. When you place a table, you can create a link to the external file. Then, if you update the Word or Excel file, you can easily update that information in the InDesign document.

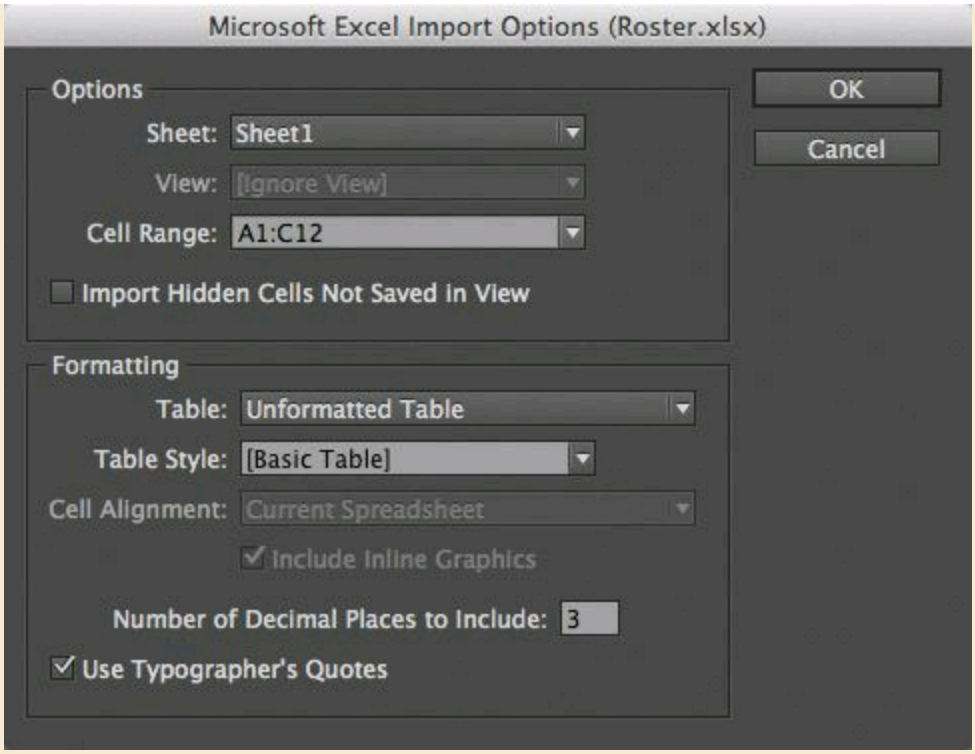
To import a table:

1. Using the Type tool (T), click to place an insertion point in a text frame.
2. Choose File > Place.
3. In the Place dialog box, select Show Import Options.
4. Select a Word file (.doc or .docx) that contains a table, or an Excel file (.xls or .xlsx).
5. Click Open.
6. Use the Import Options dialog box to specify how to handle the formatting in Word tables. For Excel files, you can specify what worksheet and cell range to import along with how to handle the formatting.

To link to tables when they are imported:

1. Choose Edit > Preferences > File Handling (Windows) or InDesign > Preferences > File Handling (Mac OS).
2. In the Links section, select Create Links When Placing Text And Spreadsheet Files, and then click OK.
3. If the data in the source file changes, use the Links panel to update the table in the InDesign document.

Note that for tables to retain their InDesign applied formatting when the Excel file is updated, all cells in the InDesign table must be formatted with table and cell styles. Header and footer rows must be reapplied when updating a link.



The Import Options dialog box for importing an Excel spreadsheet.

Changing rows and columns

Even if you start with source data from a client, it's common that you will need to add a few rows, rearrange text, and more in a table during a document's review cycle. Once a table is created, you can easily add rows and columns, delete rows and columns, merge cells, rearrange rows, adjust row height and column width, and specify text inset for cells. In this section, you will complete the shell of the table so you know the size before you start formatting it.

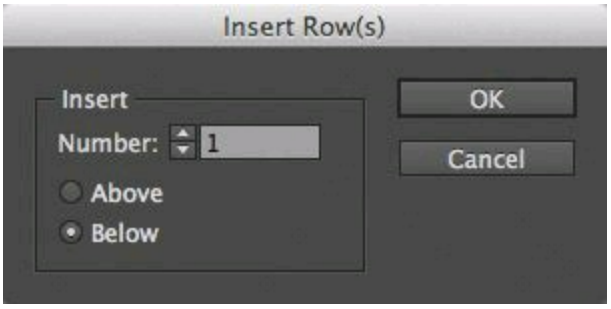
Adding and deleting rows

You can add rows above or below a selected row, and you can delete selected rows. The controls for adding and deleting columns work the same as for adding and deleting rows. Here, you will add a row to the top of the table to contain the column descriptions, and you will delete an extra row at the bottom.

Tip

To select multiple rows to delete, position the Type tool on the left edge of the table until the arrow displays; drag to select the rows. To select multiple columns to delete, position the Type tool on the top edge of the table until the arrow displays; drag to select the columns.

1. Using the Type tool (T), click in the first row of the table, which starts with "ASSOCIATE," to select it. You can click in any cell.
2. Choose Table > Insert > Row.
3. In the Insert Row(s) dialog box, enter **1** in the Number box and click Below. Click OK to add the row.



4. Click in the first new cell and type **Department.** To add column heads to the remaining cells, click with the Type tool in each empty cell or press the Tab key to navigate from cell to cell. Type the following text in each cell as shown:
   - Second cell: **Course No.**
   - Third cell: **Course Name**
   - Fourth cell: **Credits**

ASSOCIATE DEGREE COURSES			
Department	Course No	Course Name	Credits
Art	102	Survey of Studio Art	3
Art	205	Fundraising for the Arts	2

Note

Throughout this lesson, you will experiment with different options for selecting table elements and modifying tables. These include using the Table menu, Table panel, and Control panel. Once you become accustomed to working with tables, you can use the options that work best for you.

5. Using the Type tool, click in the first cell of the second row, then drag to the right to select all cells in the row with the new column headings.
6. Choose Type > Paragraph Styles.
7. Select Table Column Heads from the Paragraph Styles panel.

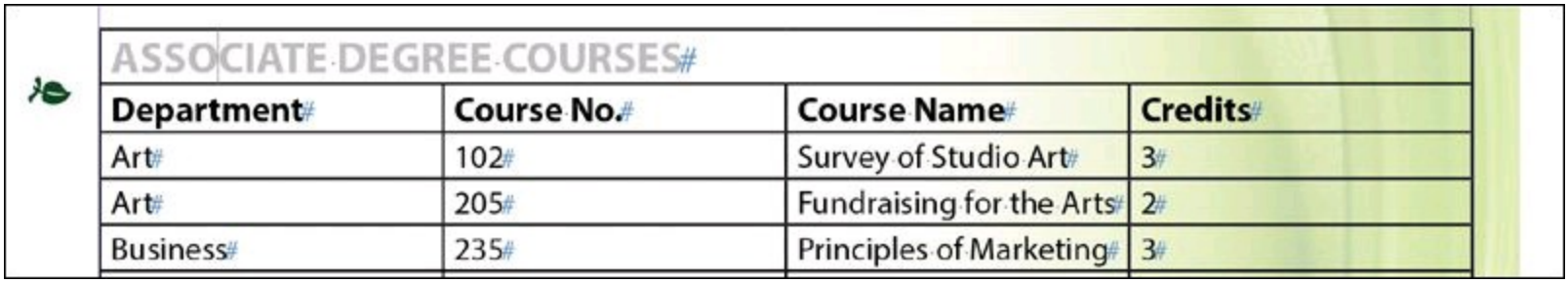
ASSOCIATE DEGREE COURSES	
Department	**Course No.**
Art	102
Art	205
Business	235
Communications	101

8. Click in the last row of the table, which is blank.
9. Choose Table > Delete > Row.
10. Choose File > Save.

Merging cells

You can merge adjacent selected cells to produce a single cell. Here, you will merge the cells in the top row so the header spans the table.

1. Using the Type tool (T), click in the first cell of the first row, then drag to select all the cells in the row.
2. Choose Table > Merge Cells.
3. Choose File > Save.



ASSOCIATE DEGREE COURSES			
Department	**Course No.**	**Course Name**	**Credits**
Art	102	Survey of Studio Art	3
Art	205	Fundraising for the Arts	2
Business	235	Principles of Marketing	3

Rearranging rows and columns

While you're working on a table, you may find that information works better in a different order, or you may discover a mistake. In that case, you can select and drag rows or columns to a new location. This table is in alphabetical order by department, but the "Science" row is in the wrong location.

Tip

Rearranging columns works the same way as rearranging rows. Select the column and drag it to a new location with the Type tool. To do this, the table needs to have the same number of columns throughout.

---

1. Locate the row that starts with "Science," approximately two-thirds of the way down the table.
2. Using the Type tool (T), move the pointer over the left edge of the "Science" row until it appears as a horizontal arrow (→). Click to select the row.

Tip

To drag and drop rows or columns, you must select the entire row or column. To drag a copy of a row or column to a new position, press Alt (Windows) or Option (Mac OS) while dragging.

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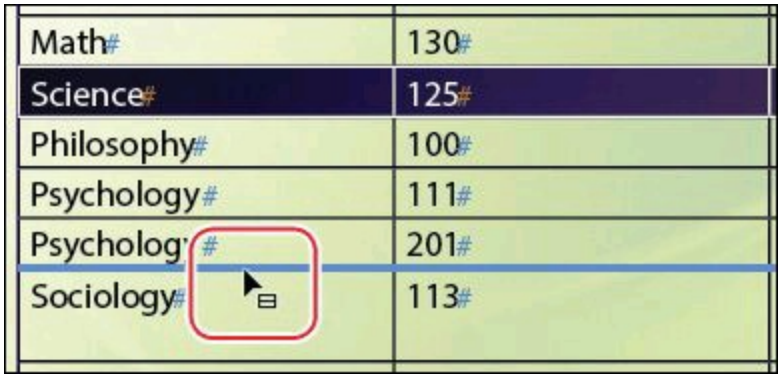
3. Drag the "Science" row down and drop it just above the first "Sociology" row. The blue line indicates where the row will be inserted.



4. Choose File > Save.

Adjusting column widths, row heights, and text placement

Columns, rows, and the way text fits within them often needs fine-tuning according to the content and the design. By default, table cells expand vertically to fit their content—so if you keep typing within a cell, it expands. You can, however, specify a fixed row height or have InDesign create columns or rows of equal size within the table. In this exercise, you will manually adjust the column widths, and then you will modify how the text fits within the cells.

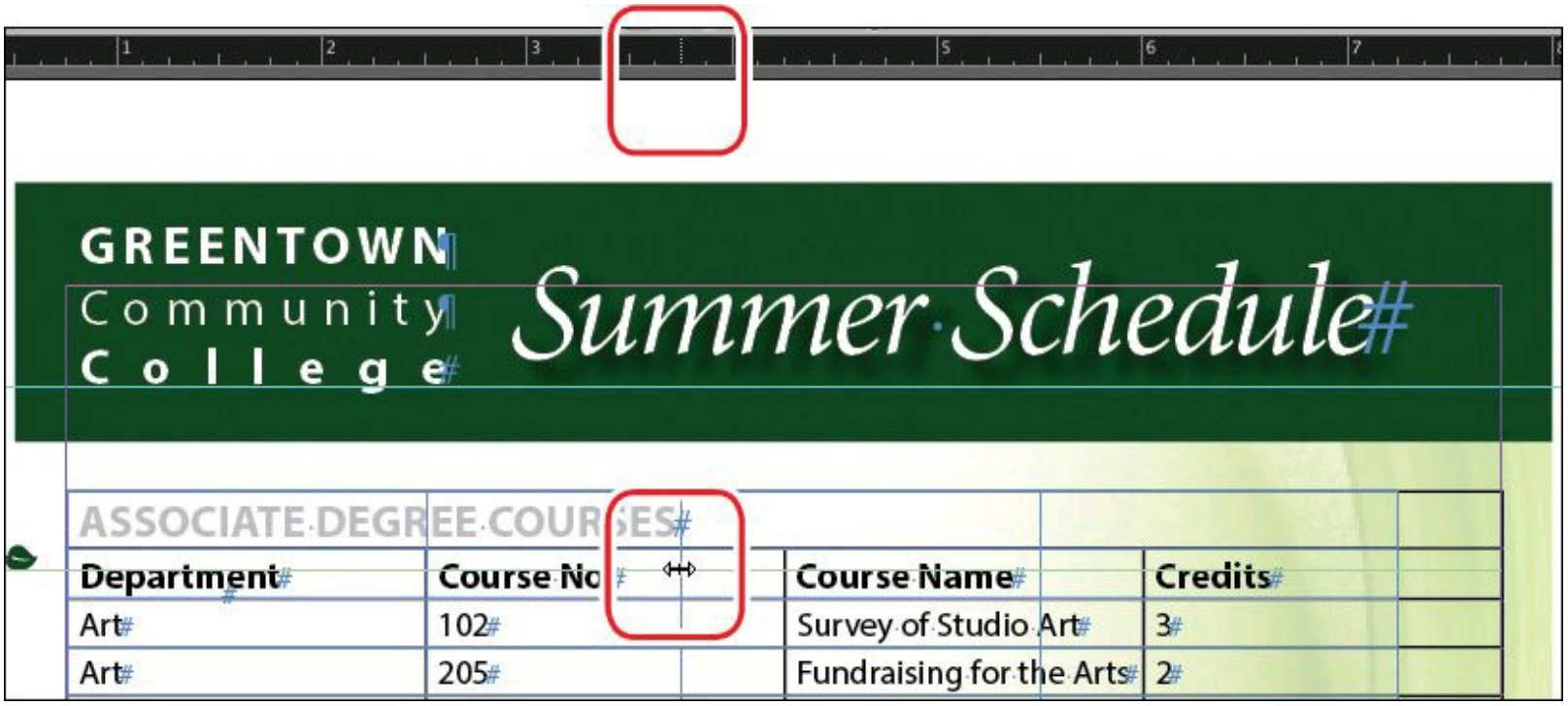
1. Using the Type tool (T), point at a vertical stroke between two columns. When the double-arrow icon (↔) displays, drag to the left or right to resize the column.

Tip

Dragging the cell boundary between two columns changes the size of the column and moves the remainder of the columns out or in (depending on whether you increase or decrease the column size). To retain the overall table width when dragging cell boundaries, press Shift and then drag the boundary. The columns adjoining the boundary are now increased or decreased in size without the table size being altered.

---

2. Choose Edit > Undo. Experiment with resizing columns a few more times to get a feel for the tool; choose Edit > Undo after each move. As you drag, keep an eye on the horizontal ruler at the top of the document window.
3. Place the final columns by dragging the right edge of each column as follows:
   - Course No. column: 3.75″ on the horizontal ruler
   - Course Name column: 6.5″ on the horizontal ruler
   - Credits column: 7.75″ on the horizontal ruler (the right edge of the text frame).



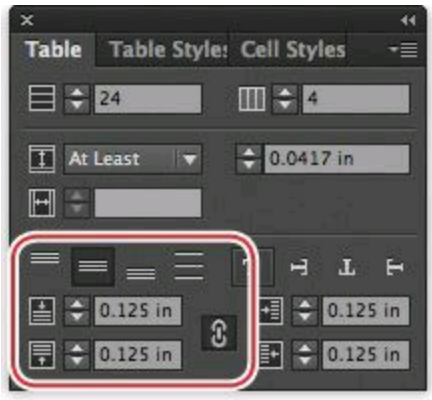
Tip

If you want columns of the same width, rows of the same height, or both, choose Table > Distribute Columns Evenly or Table > Distribute Rows Evenly.

Now that the columns widths better fit the text, you will add a little space around the text in the cells. In this case, you will change the entire table, but you can modify selected cells only.

4. Choose Window > Type & Tables > Table to open the Table panel.
5. Click anywhere in the table and choose Table > Select > Table.
6. Type **.125 in** in the Top Cell Inset field ( ) and press Enter or Return. If necessary, click Make All Settings The Same ( ), to increase the inset on all four edges of each cell.
7. With the table still selected, click Align Center in the Table panel.

   This centers the text vertically within each cell.



8. Click anywhere in the table to deselect the cells.
9. Choose File > Save.

At this point, the table has grown beyond the current text frame and continued on to the threaded text frame on the second page.

Formatting a table

The border of a table is a stroke that lies outside the entire table. Cell strokes are lines within the table that set the individual cells apart from each other. InDesign includes many easy-to-use formatting options for tables. You can use these to make tables attractive and help them easily convey information to readers. In this section, you will specify fills and strokes for the table.

Adding a fill pattern

To achieve effects such as shading every other row, InDesign provides fill patterns for both rows and columns. You can specify where the pattern starts, which allows you to exclude any header rows. As you add, delete, and move rows and columns, the pattern updates automatically. You will add a fill to every other row in this table.

1. Using the Type tool (T), click anywhere in the table to select it.
2. Choose Table > Table Options > Table Setup. In the Table Options dialog box, click the Fills tab at the top.
3. From the Alternating Pattern menu, choose Every Other Row. Leave the default settings for the remaining options.

4. Click OK. Choose Edit > Deselect All so that you can see the results.
5. Choose File > Save.

Every other body row now has a gray background.

ASSOCIATE·DEGREE·COURSES#

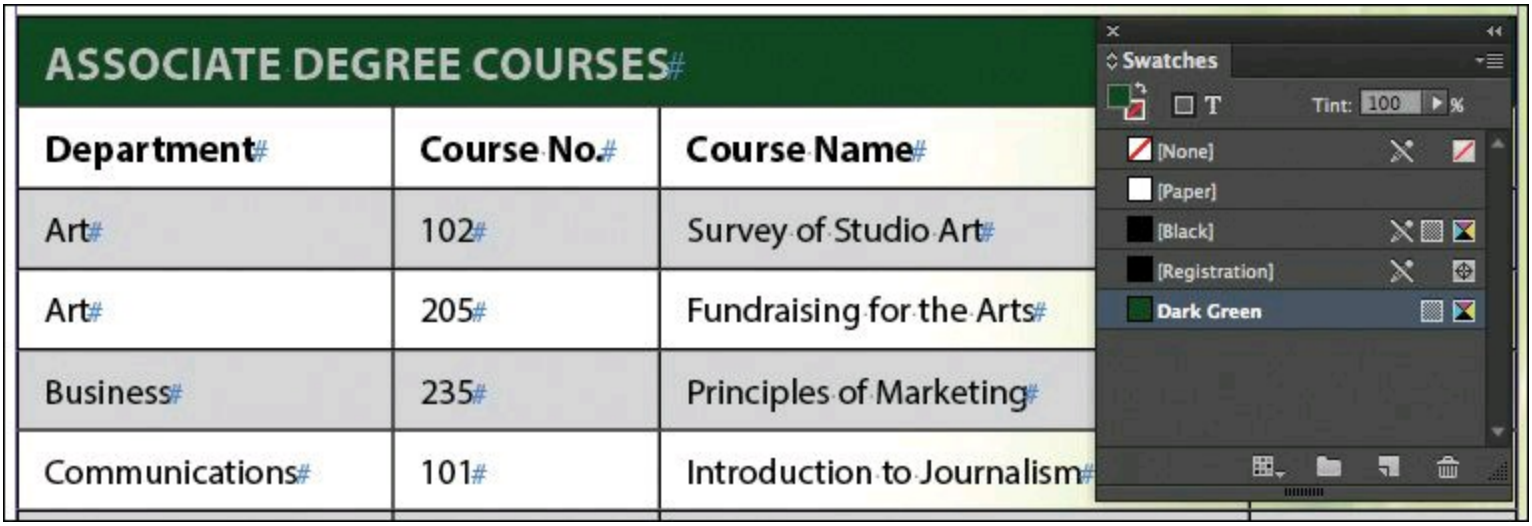
Department#	Course No.#	Course Name#	Credits#
Art#	102#	Survey of Studio Art#	3#
Art#	205#	Fundraising for the Arts#	2#
Business#	235#	Principles of Marketing#	3#
Communications#	101#	Introduction to Journalism#	4#

Applying a fill color to cells

Applying a fill color to cells

A table can have a fill color, and each cell can have its own fill color. Using the Type tool, you can drag to select any contiguous cells to apply a fill color. In this section, you will apply a fill color to the header row so the gray text is easier to read.

1. Using the Type tool (), move the pointer over the left edge of the "ASSOCIATE" row until it appears as a horizontal arrow (). Click to select the row.
2. Choose Window > Color > Swatches.
3. Select the Fill box () in the Swatches panel, and then click the Dark Green swatch.
4. Drag the Tint slider all the way to the right to 100%. Choose Edit > Deselect All to view the color.

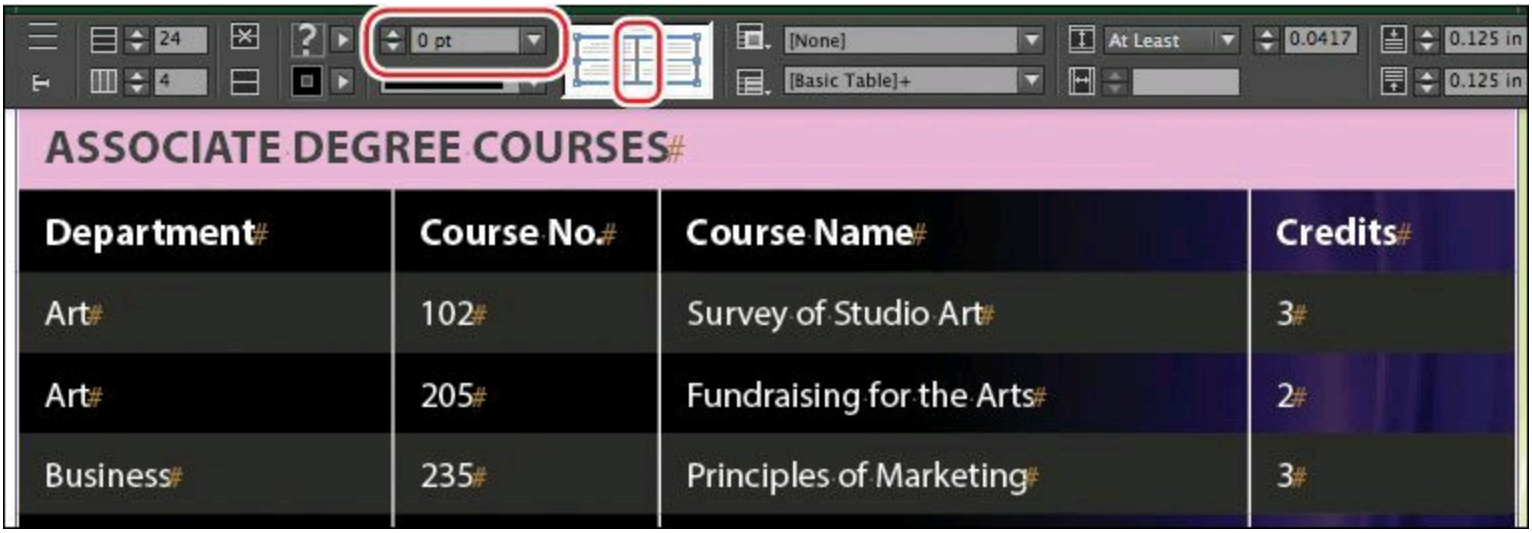


5. Choose File > Save.

Editing cell strokes

Cell strokes are the lines around individual cells. You can remove or change the stroke for selected cells or for the entire table. In this section, you will remove the stroke width from all the horizontal strokes, as the alternating pattern provides enough delination.

1. Using the Type tool (), click anywhere in the table, and then choose Table > Select > Table.
2. Locate the grid tool () in the Control panel. Each horizontal and vertical line represents a row, column, or border stroke.
3. The three horizontal strokes are selected for formatting, but you will remove the vertical strokes from the selection. Click each vertical line to deselect it.
4. Type **0** in the Control panel's Stroke field. Press Enter or Return.

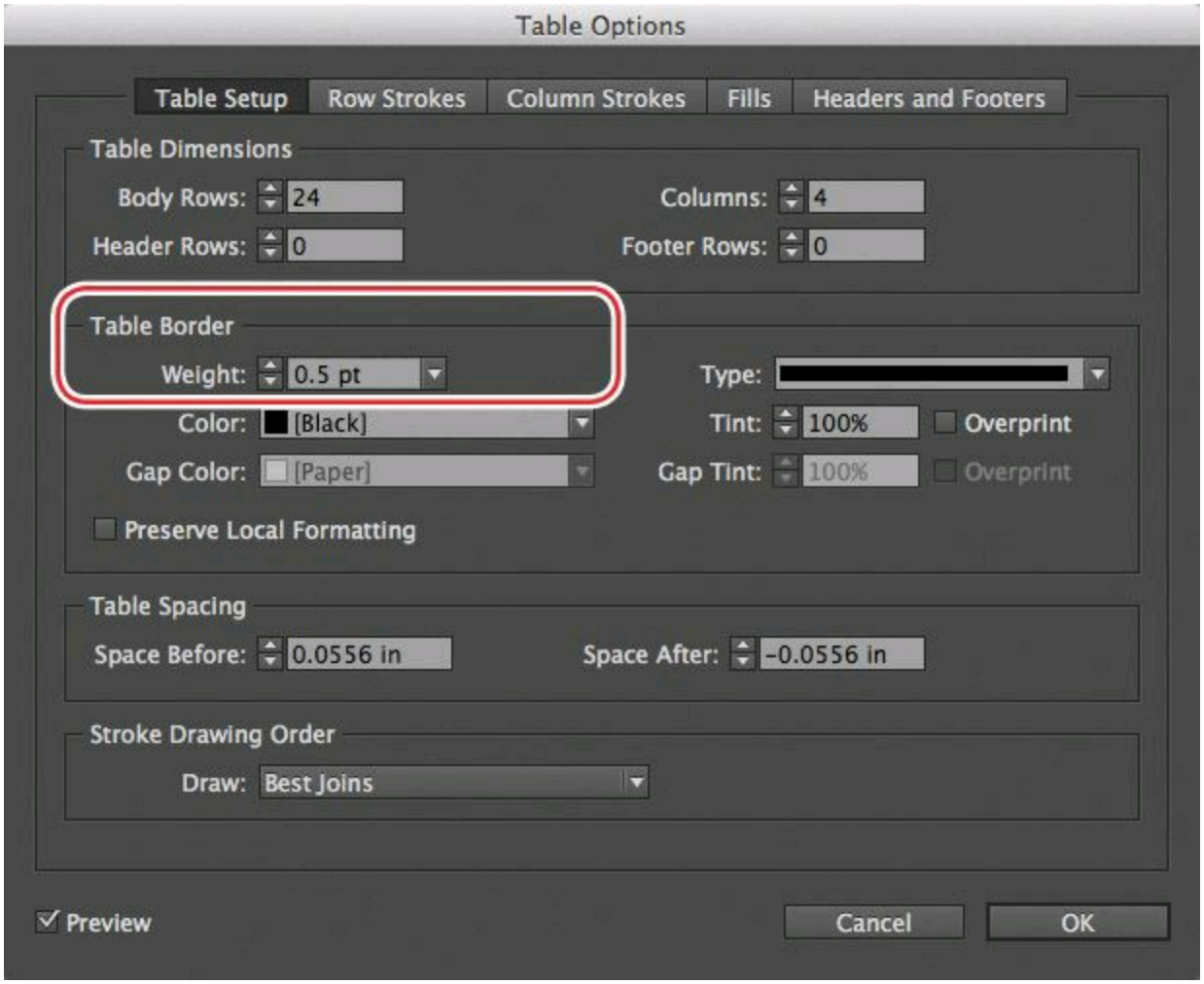


5. Choose Edit > Deselect All to see the results.
6. Choose File > Save.

Adding table borders

A table border is a stroke around the entire table. As with other strokes, you can customize the width, style, color, and more. In this section, you will apply a border to the table.

1. Using the Type tool (T), click anywhere in the table.
2. Choose Table > Select > Table.
3. Choose Table > Table Options > Table Setup to open the Table Options dialog box. Check Preview in the lower-left corner.
4. In the Table Setup tab, in the Table Border section, choose 0.5 pt from the Weight menu.



5. Click OK, and then choose Edit > Deselect All to see the results of your formatting.
6. Choose File > Save.

Creating a header row

A table's name and the column headings are often formatted to stand out from the rest of the table. To do this, you can select and format the cells that contain the header information. This header information needs to repeat if the table flows across multiple pages. With InDesign, you can specify header and footer rows that repeat when a table continues to the next column, frame, or page. Here, you will format the first two rows of the table—which often contain the table name and the column headings—and specify them as header rows that repeat.

Tip

When you edit text in a header row, the text is automatically updated in other instances of the header row. You can edit the text in the original header; the other instances of the header are locked.

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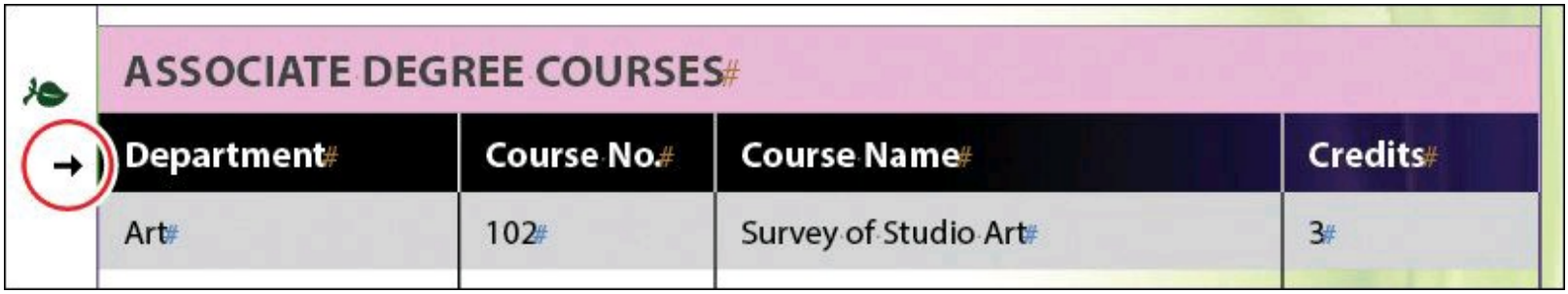
1. Using the Type tool (T), move the pointer over the left edge of the first row until it appears as a horizontal arrow (→).
2. Click to select the entire first row, then drag to include the second row.



3. With the two rows still selected, choose Table > Convert Rows > To Header.
4. Choose Layout > Next Page to view the table on page 2. Notice that the continuation of the table has the same header rows.
5. Choose File > Save.

Adding graphics to table cells

You can use InDesign to create effective tables that combine text, photographs, and illustrations. Since table cells are essentially small text frames, you add graphics by anchoring them in the cell's text flow. Graphics anchored in cells can cause text overflow, indicated by a red dot in the cell. To fix this, drag the cell borders to resize the cells as necessary. In this exercise, you will place a leaf icon next to the classes that are held off-campus.

1. Choose Layout > Previous Page to display page 1 in the document window. If necessary, choose View > Fit Page In Window.
2. Using the Selection tool (), select the leaf icon immediately to the left of the header rows.
3. Choose Edit > Copy.

Tip

You can temporarily switch from the Type tool to the Selection tool by holding down the Ctrl (Windows) or Command (Mac OS) key.

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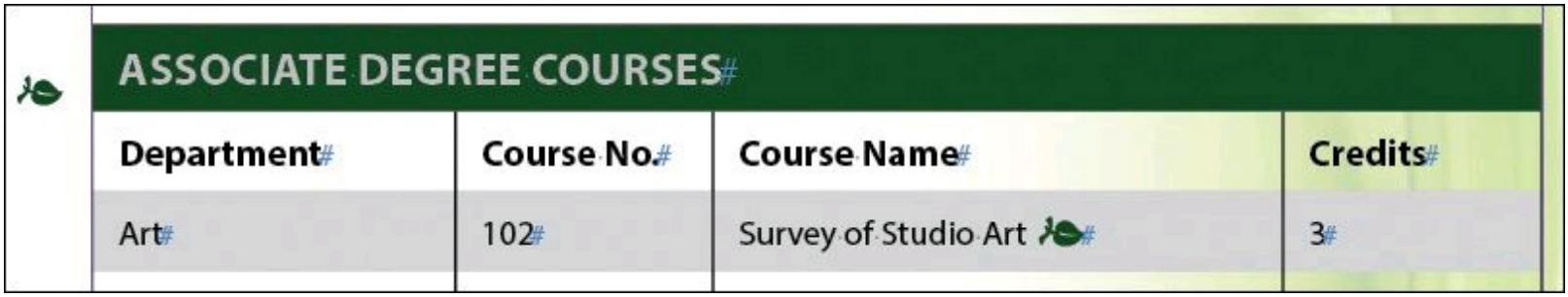
4. Select the Type tool (), or double-click inside the table to automatically switch to the Type tool.
5. In the first body row of the table, click immediately after "Survey of Studio Art."
6. Choose Edit > Paste.



7. Click the Type tool after to "Video Production" and choose Edit > Paste. Video Production is in the Communications department.
8. Click the Type tool after to "Web Content Development" and choose Edit > Paste. Web Content Development is in the Computers department.

In addition to pasting a graphic at the text insertion point, you can choose File > Place to import a graphic file and simultaneously anchor it within a table cell.

9. Choose File > Save.

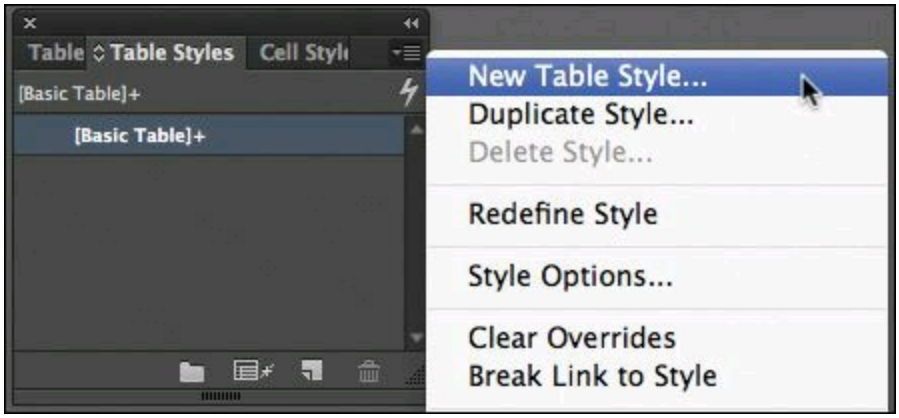
Creating and applying table and cell styles

To quickly and consistently apply formatting to tables, you can create table styles and cell styles. A table style applies to the entire table, whereas cell styles can be applied to selected cells, rows, and columns. Here, you will create a table style and a cell style so the formatting can be quickly applied to other types of order forms.

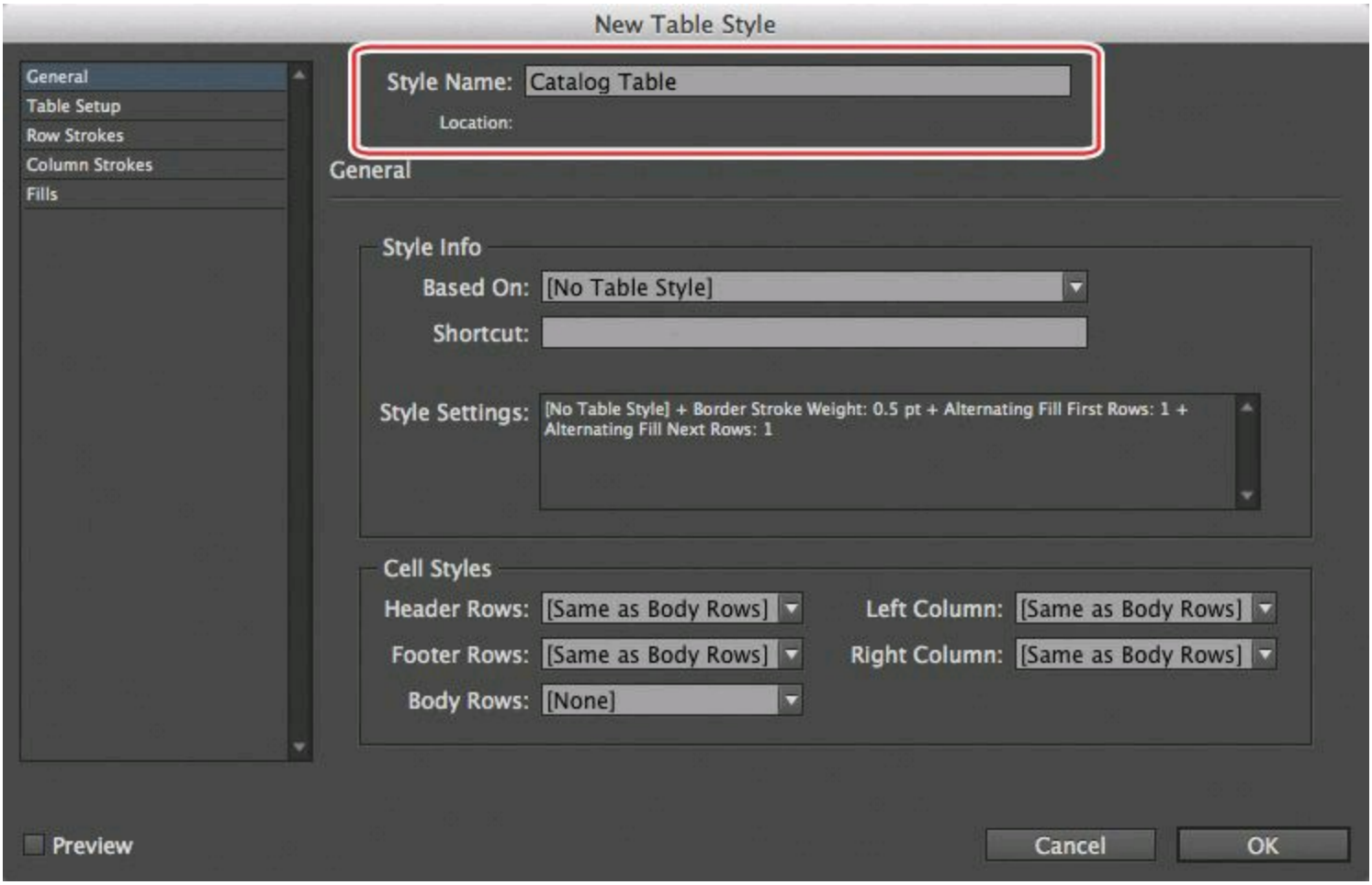
Creating table and cell styles

In this exercise, you will create a table style for the basic table formatting and a cell style for the header rows. Rather than specify formatting in the styles, you will simply create styles based on the formatting of the table.

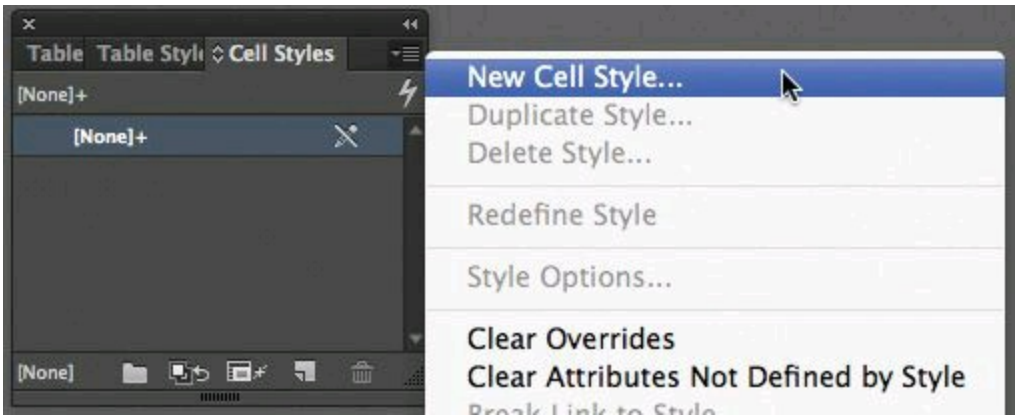
1. Using the Type tool (T), click anywhere in the table.
2. Choose Window > Styles > Table Styles, and then choose New Table Style from the panel menu.



3. Name the style **Catalog Table** in the Style Name box.

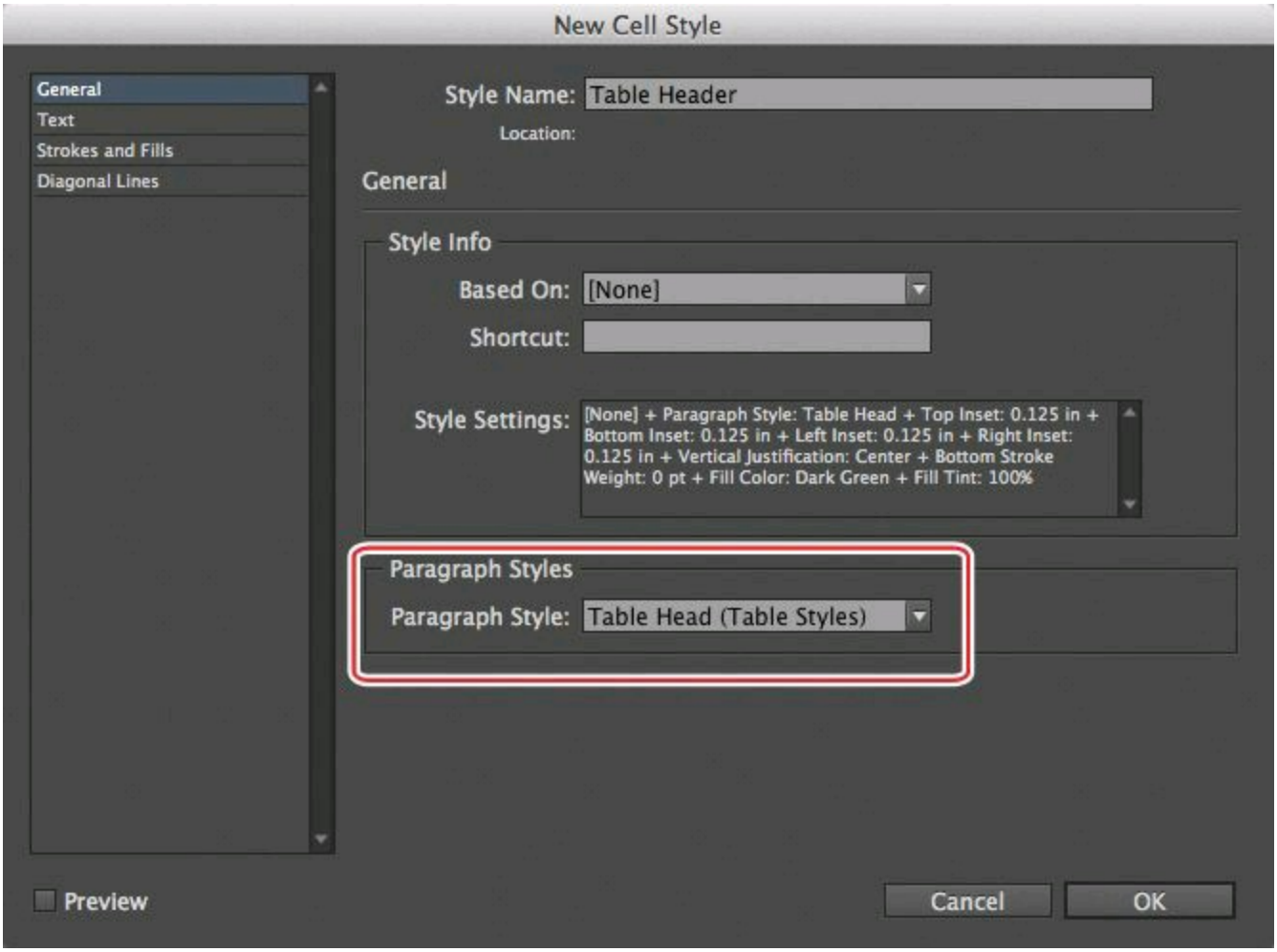


4. Click OK. The new style appears in the Table Styles panel.
5. Using the Type tool, click in the first row of the table, which says "ASSOCIATE DEGREE COURSES."
6. Choose Window > Styles > Cell Styles, and then choose New Cell Style from the panel menu.



7. Name the style **Table Header** in the Style Name box.

   You will now specify a different paragraph style for the text in cells with the Header Rows style applied.
8. From the Paragraph Style menu, select Table Head. This is the paragraph style already applied to the text in the header rows.

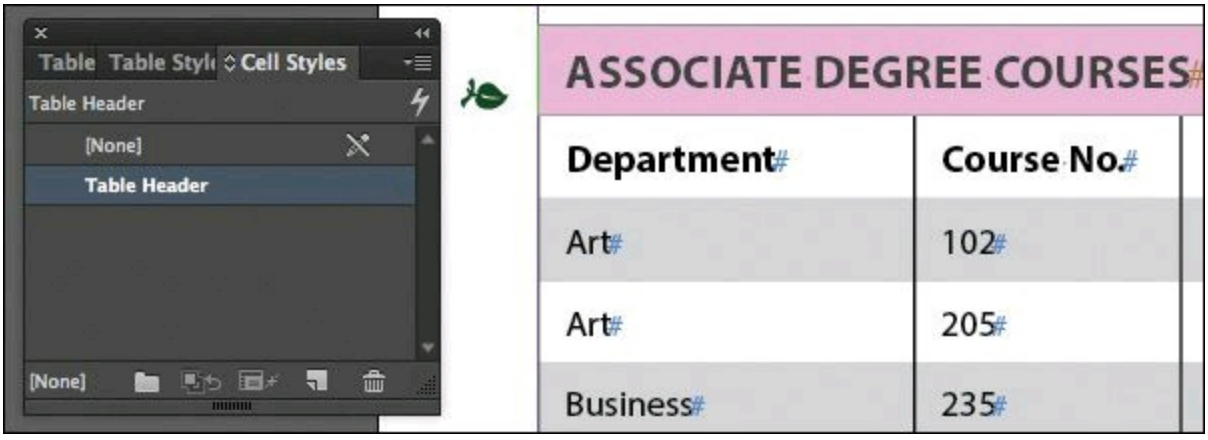


9. Click OK.
10. Choose File > Save.

Applying table and cell styles

Now, you will apply the styles to the table. To make global changes to table formatting later, you can simply edit the table or cell styles.

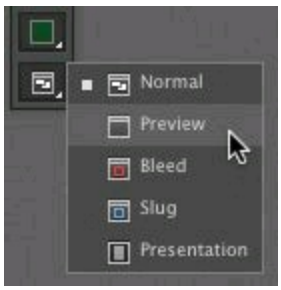
1. Using the Type tool (T), click anywhere in the table.
2. Click the Catalog Table style in the Table Styles panel.
3. Using the Type tool, click in the first header row of the table. Choose Table > Select > Row, to select the row.
4. Click the Table Header style in the Cell Styles panel.



5. Deselect all, choose View > Fit Page In Window, and choose File > Save.

As a final step, you'll preview the flyer in its current state. You can add rows for more courses to this table later.

6. At the bottom of the Tools panel, select Preview to view the final table.



Congratulations! You have now completed this lesson.

Exploring on your own

Now that you're skilled in the basics of working with tables in InDesign, you can experiment with other techniques for building tables.

1. First, create a new document. The page size and other specifications do not matter. To create a new table, drag the Type tool ( ) to create a text frame. Then choose Table > Insert Table and enter the number of rows and columns you want in your table.
2. To enter information in your table, make sure that the insertion point is in the first cell and then type. Use the arrow keys on the keyboard to navigate among the cells.
3. To add a new column by dragging, position the Type tool over the right edge of one of the columns in your table so that the pointer becomes a double-arrow icon ( ) and begin dragging to the right. Hold down Alt (Windows) or Option (Mac OS) and drag a short distance to the right, perhaps half an inch or so. When you release the mouse button, a new column appears. (The column has the same width as the distance you dragged.)
4. To convert the table to text, choose Table > Convert Table To Text. Tabs can separate what were previously columns, and paragraph breaks can separate rows. You can also modify these options. Similarly, you can convert tabbed text to a table by selecting the text and choosing Table > Convert Text To Table.
5. To rotate text within a cell, click with the Type tool to place an insertion point in a cell. Choose Window > Type & Tables > Table. In the Table panel, select the Rotate Text 270° ( ) option. Then type the text you want in this cell. Increase the size of the cell as necessary to see the text.

Review questions

1. What are the advantages of using tables rather than just typing text and using tabs to separate the columns?
2. When might you get an overset cell?
3. What tool is used most frequently when you work with tables?

Review answers

1. Tables give you much more flexibility and are far easier to format. In a table, text can wrap within a cell, so you don't have to add extra lines to accommodate cells that contain a lot of

text. Also, you can assign styles to selected cells, rows, and columns—including character styles and even paragraph styles—because each cell functions like a separate text frame.

2. Overset cells occur when the contents don't fit inside the cell's current dimensions. This overset might occur if you have defined the exact height of a row and inserted too much text or rotated the text. Otherwise, when you place text in the cell, the text wraps within the cell, which then expands vertically to accommodate the text. When you place a graphic in a cell that does not have a fixed row height, the cell expands vertically but not horizontally, so the column keeps its original width.

3. The Type tool must be selected to work with a table. You can use other tools to work with the graphics within table cells, but to work with the table itself, such as selecting rows or columns, inserting text or graphics, adjusting table dimensions, and so forth, you use the Type tool.

12. Working with Transparency

Lesson Overview

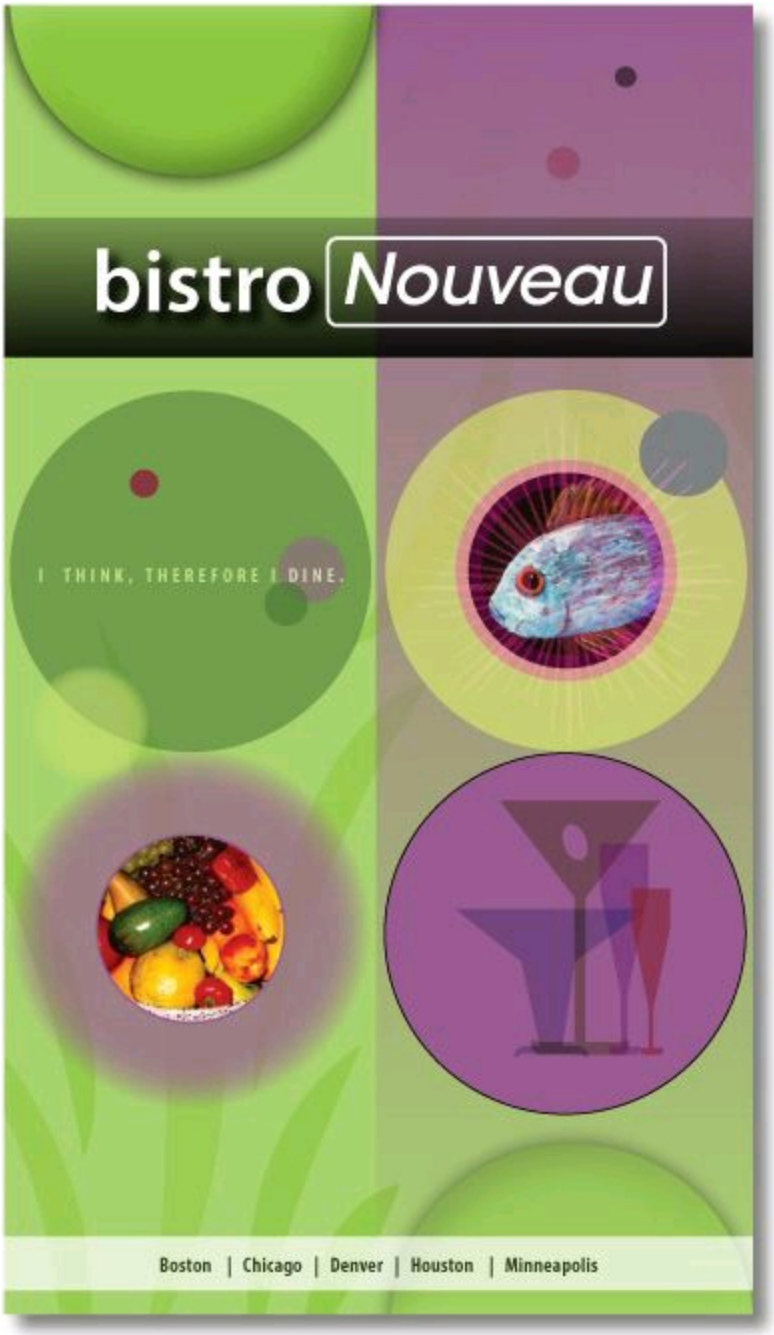
In this lesson, you'll learn how to do the following:

- Colorize an imported grayscale image.
- Change the opacity of objects drawn in InDesign.
- Apply transparency settings to imported graphics.
- Apply transparency settings to text.
- Apply blending modes to overlapping objects.
- Apply feathering effects to objects.
- Apply multiple effects to an object.
- Edit and remove effects.

This lesson will take approximately 45 minutes.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the Getting Started section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.



Adobe InDesign offers an array of transparency features to feed your imagination and creativity. These include controls over opacity, effects, and color blends. You can also import files that use transparency and apply additional transparency effects.

Getting started

The project for this lesson is the cover of a menu for a fictional restaurant, Bistro Nouveau. By applying transparency effects and using a series of layers, you'll create a visually rich design.

1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.

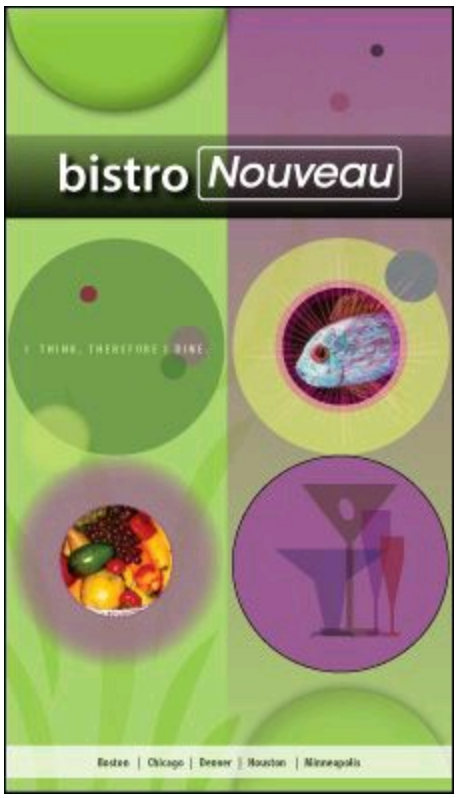
Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning

of the book.

2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced. To begin working, you'll open an InDesign document that is already partially completed.
3. Choose File > Open, and open the 12_a_Start.indd file in the Lesson12 folder, which is located within the Lessons folder in the InDesignCIB folder on your hard drive. (If the Adobe Typekit dialog box displays, click Sync Fonts.)
4. Choose File > Save As, name the file **12_Menu.indd**, and save it in the Lesson12 folder.

   The menu appears as a long, blank page because all of the layers are currently hidden. You'll reveal these layers one by one as you need them, so it will be easy to focus on the specific objects and tasks in this lesson.
5. To see what the finished project looks like, open the 12_b_End.indd file in the Lesson12 folder.



6. When you are ready to start working, either close the 12_b_End.indd file or leave it open for your reference. Then return to your lesson document by choosing 12_Menu.indd from the Window menu or clicking the 12_Menu.indd tab in the upper-left corner of the document window.

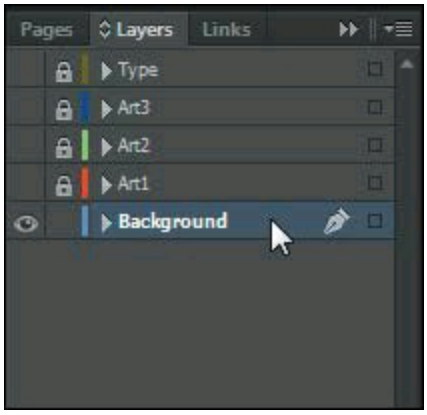
Importing and colorizing a grayscale image

You'll begin by working with the Background layer for the restaurant menu. This layer serves as a textured background that is visible through the objects layered above it that have transparency effects. By applying transparency effects, you can create see-through objects that reveal any objects underneath.

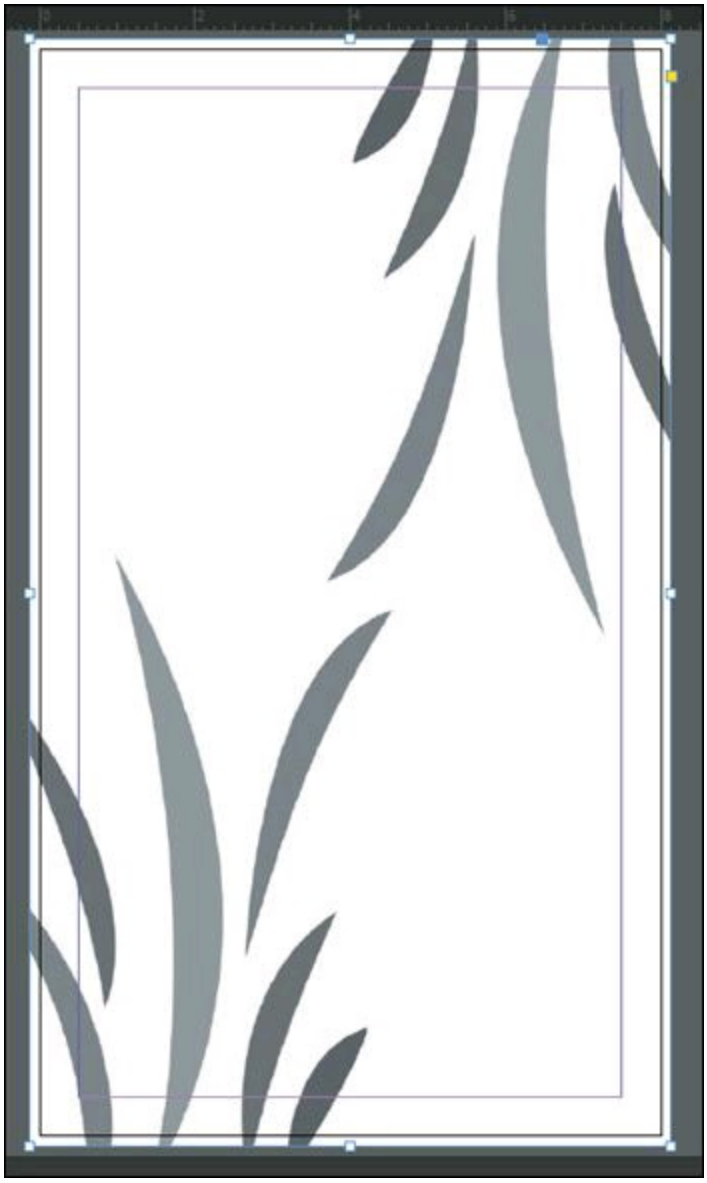
Because nothing is below the Background layer in the layer stack, you won't apply any transparency

effects to objects on this layer.

1. Choose Window > Layers to display the Layers panel.
2. In the Layers panel, select the layer labeled Background, scrolling as necessary to find it at the bottom of the layer stack. You'll place the image you import on this layer.
3. Make sure that the two boxes to the left of the layer name show that the layer is visible (the eye icon [] appears) and unlocked (the layer lock icon [] does not appear). The pen icon () to the right of the layer name indicates that this is the layer on which the imported objects will be placed and new frames will be created.



4. Choose View > Grids & Guides > Show Guides. You'll use the guides on the page to align the background image that you import.
5. Choose File > Place, and then open the 12_c.tif file in your Lesson12 folder. This file is a grayscale TIFF.
6. Move the loaded graphics icon () slightly outside the upper-left corner of the page; then click the corner where the red bleed guides meet so that the placed image fills the entire page, including the margins and bleed area. Keep the graphics frame selected.



7. Choose Window > Color > Swatches. You'll use the Swatches panel to colorize the image, first adjusting the tint of the desired swatch.

Tip

You can also select the Fill box at the bottom of the Tools panel.

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8. In the Swatches panel, select the Fill box (). Scroll down the list of swatches to find the Light Green swatch and select it. Click the Tint menu at the top of the panel and drag the slider to 76%.

   The white background of the graphics frame is now a 76% tint of the green color, but the gray areas of the graphic remain unchanged.

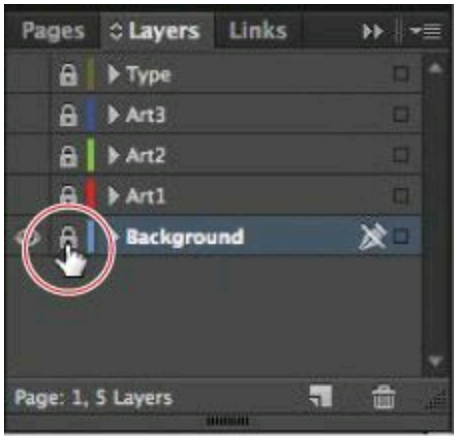
9. Using the Selection tool (), move the pointer within the content grabber at the center of the frame. When the hand pointer () appears, click to select the graphic within the frame, and then select Light Green in the Swatches panel. Light Green replaces gray in the image, leaving the Light Green 76% areas as they were.

After applying a fill color and tint to the frame.

After applying color to the graphic.

InDesign lets you apply color to grayscale or bitmap images saved in PSD, TIFF, BMP, or JPEG format. When you select the graphic within a graphics frame and then apply a fill color, the color is applied to the gray portions of the image rather than to the background of the frame, as it was in step 8, when the frame was selected.

10. In the Layers panel, click the empty box to the left of the Background layer name to lock the layer. Leave the Background layer visible so that you can see the results of the transparent objects you will be placing above this layer.



11. Choose File > Save to save your work.

You've just learned a quick method for colorizing a grayscale image. While this method works well for creating composites, you may find the color controls available in Adobe Photoshop more effective for creating your final artwork.

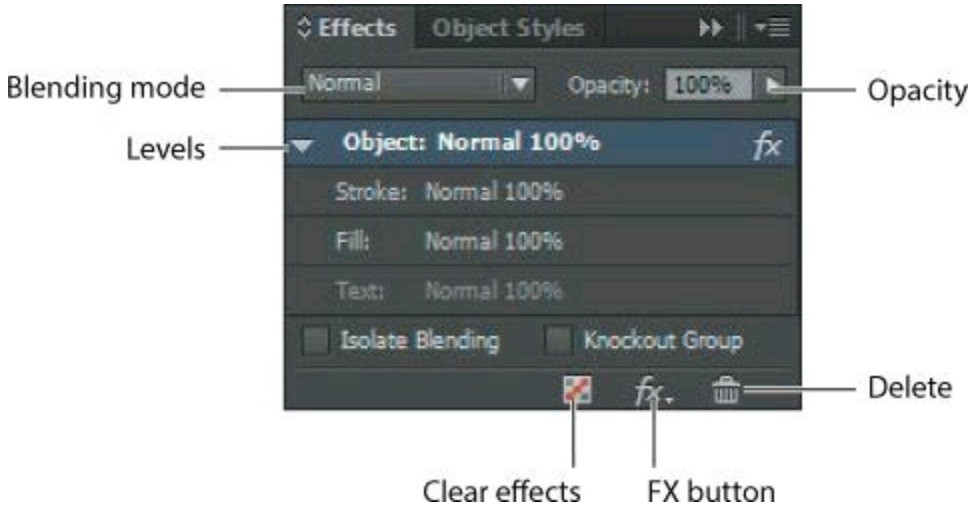
Applying transparency settings

InDesign has extensive transparency controls. For example, by lowering the opacity of objects, text, and even imported graphics, you can reveal underlying objects that would otherwise not be visible. Additional transparency features, such as blending modes, drop shadows, feathered and glowing edges, and bevel and emboss effects, provide a wide range of options for creating special visual effects; you'll learn about these additional features later in the lesson.

In this part of the project, you'll practice using a variety of transparency features on several objects that are placed on the various layers in the menu.

About the Effects panel

You use the Effects panel (Window > Effects) to specify the opacity and blending mode of objects and groups, isolate blending to a particular group, knock out objects inside a group, and apply a transparency effect.



Effects panel overview

Blending Mode—Lets you vary the ways in which the colors of overlapping objects blend with each other.

Levels—Tells you the Object, Stroke, Fill, and Text opacity settings of the selected object, as well as whether transparency effects have been applied. Click the triangle to the left of the word Object (or Group or Graphic) to alternately hide and display these level settings. The FX icon appears on a level after you apply transparency effects there, and you can double-click the FX icon to edit the settings.

Clear Effects—Clears effects (stroke, fill, or text) from an object, sets the blending mode to Normal, and changes the Opacity setting to 100% throughout the selected object.

FX button—Displays a list of transparency effects.

Trash Can—Removes effects, but not a blending mode or opacity, from an object.

Opacity—As you lower the opacity value of an object, the object becomes increasingly translucent, and underlying objects become increasingly visible.

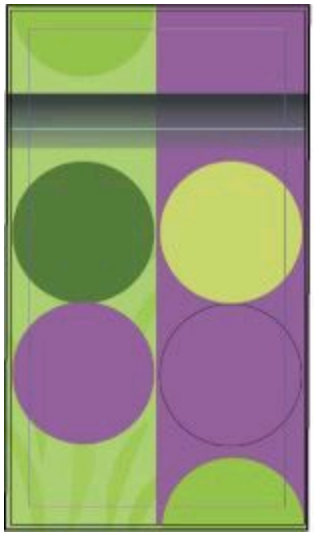
Isolate Blending—Applies a blending mode to a selected group of objects but does not affect underlying objects that are not part of the group.

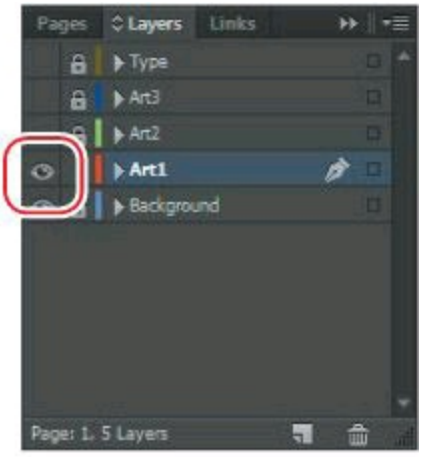
Knockout Group—Makes the opacity and blending attributes of every object in a group knock out, or block out, underlying objects in the group.

Changing the opacity of solid-color objects

With the background graphic complete, you can start applying transparency effects to objects on layers stacked above it. You'll start with a series of simple shapes that were drawn using InDesign.

1. In the Layers panel, select the Art1 layer so that it becomes the active layer, and click the lock icon ( ) to the left of the layer name to unlock the layer. Click the empty box on the far left of the Art1 layer name so that the eye icon ( ) appears, indicating that the layer is visible.





2. Using the Selection tool ( ), click the full circle filled with the Yellow/Green swatch on the right side of the page. This ellipse frame with a solid fill was drawn in InDesign.

Note

The shapes mentioned are named by the color swatch applied to the fill of the object. If the Swatches panel is not open, choose Window Color > Swatches to open it.

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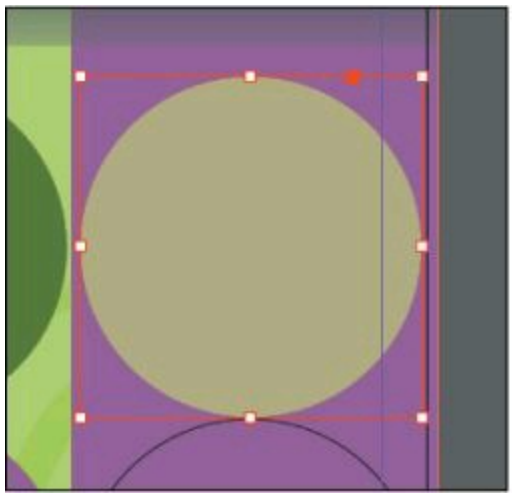
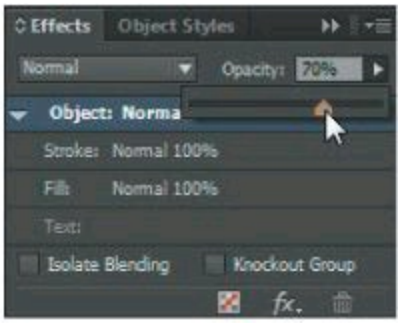
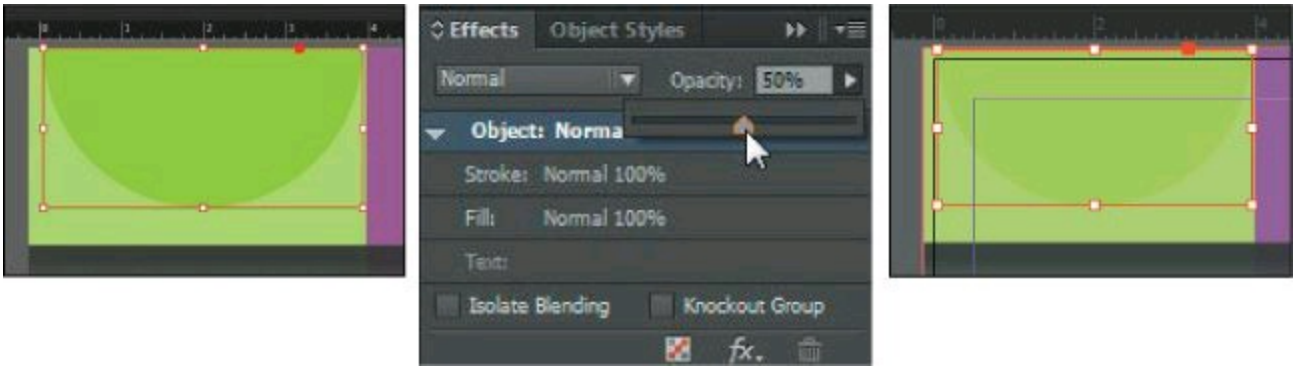
3. Choose Window > Effects to display the panel.
4. In the Effects panel, click the arrow on the right side of the Opacity percentage. An Opacity slider adjustment appears. Drag the slider to 70%. Alternatively, enter **70%** in the Opacity box and press Enter or Return.





After you change the opacity of the Yellow/Green circle, it becomes translucent, and the resulting color is a combination of the Yellow/Green fill of the circle and the Light Purple rectangle beneath it that covers the right half of the page.

5. Select the Light Green–filled semicircle in the upper-left corner of the page, then go to the Effects panel and set the Opacity value to 50%. The semicircle now appears as a subtle variation in color against the background.



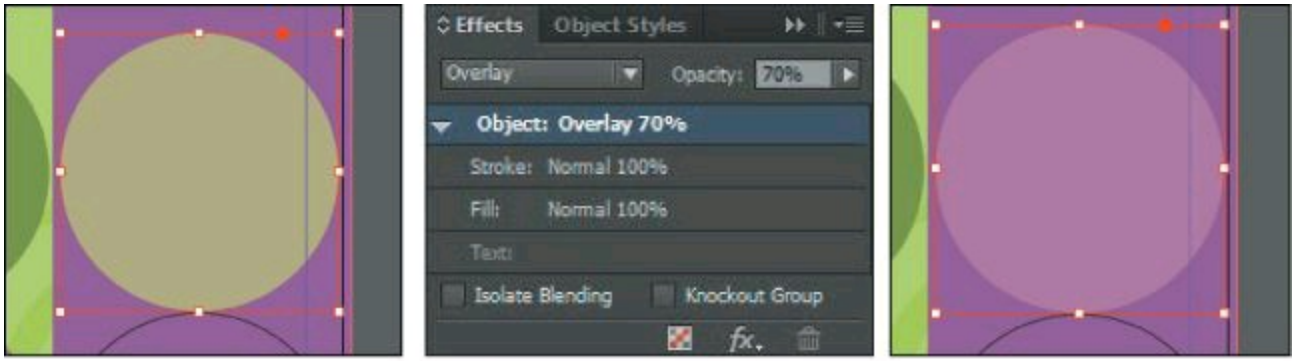
6. Repeat step 5 for the following three circles on the Art1 layer, using the following settings to change the opacity of each circle:
   - Left side, middle circle filled with the Medium Green swatch, Opacity = 60%.
   - Left side, bottom circle filled with the Light Purple swatch, Opacity = 70%.
   - Right side, bottom semicircle filled with the Light Green swatch, Opacity = 50%.
7. Choose File > Save to save your work.

Applying a blending mode

Changing an object's opacity creates a color that combines the color applied to an object with the colors applied to objects below it. Using blending modes is another way to create color interactions between stacked objects.

In this procedure, you'll apply a blending mode to three objects on the page.

1. Using the Selection tool ( ), select the Yellow/Green–filled circle on the right side of the page.
2. In the Effects panel, choose Overlay from the Blending Mode menu. Notice how the appearance of the colors changes.



70% opacity. Opacity and blending mode.

3. Select the Light Green–filled semicircle in the lower-right corner of the page, and then hold down the Shift key and select the Light Green–filled semicircle in the upper-left corner of the page.
4. In the Effects panel, choose Multiply from the Blending Mode menu.
5. Choose File > Save.

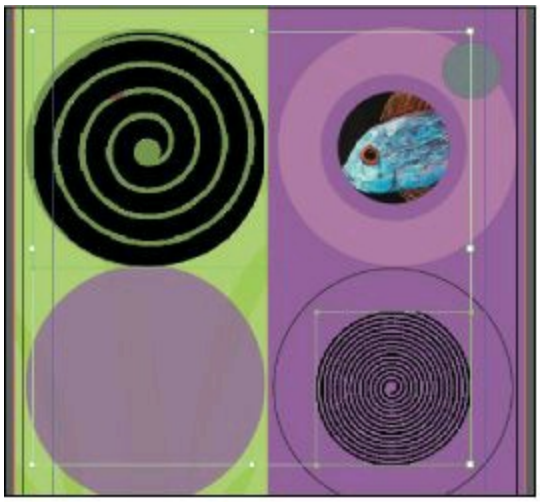
For more information on the different blending modes, see "Specify how colors blend" in InDesign Help.

Adding transparency effects to imported vector and bitmap graphics

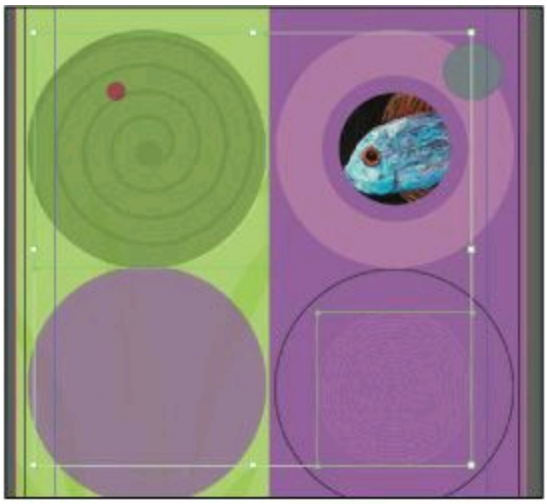
You have applied various transparency settings to objects drawn using InDesign. You can also apply opacity values and blending modes to imported graphics created with other applications, such as Adobe Illustrator and Adobe Photoshop.

Applying transparency to a vector graphic

1. In the Layers panel, unlock the Art2 layer and make it visible.
2. In the Tools panel, make sure that the Selection tool ( ) is selected.
3. On the left side of the page, select the graphics frame that contains the black spiral image by clicking within the frame when the arrow pointer ( ) is displayed. (Don't click within the content grabber when the hand pointer [ ] is displayed or you'll select the graphic rather than the frame.) This frame is in front of a Medium Green–colored circle.
4. With the black spiral frame still selected, hold down the Shift key and click to select the graphics frame that contains a black spiral on the right side of the page. This frame is in front of and within a Light Purple–colored circle. Again, make sure you select the graphics frame and not the graphic within. Both of the graphics frames with spirals should now be selected.
5. In the Effects panel, choose Color Dodge from the Blending Mode menu and set the Opacity to 30%.



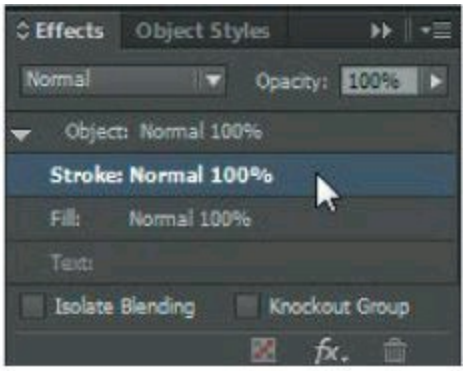
Selected frames before applying blending mode and opacity.



After applying blending mode and opacity.

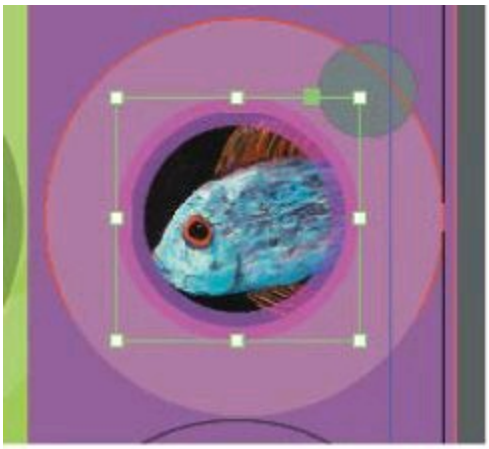
Next you will apply a blending mode to the stroke on the fish image.

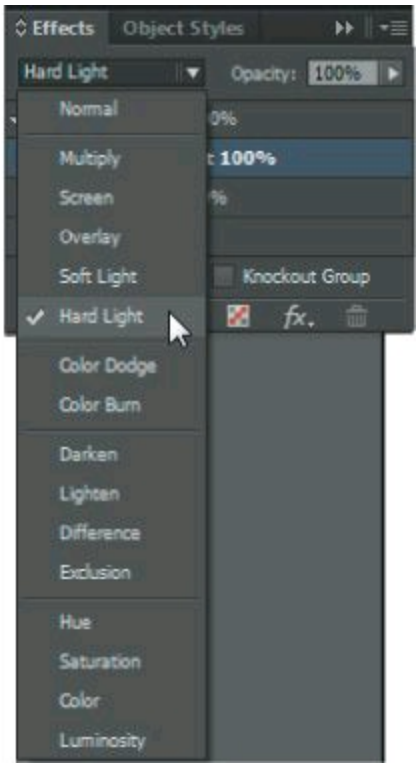
6. With the Selection tool ( ), select the circular graphics frame with the fish image on the right side of the page. Make sure the arrow pointer ( ) and not the hand pointer ( ) is displayed when you click.
7. In the Effects panel, click the Stroke level beneath Object to select it. Selecting the Stroke level applies any blending mode or opacity changes you make to only the stroke of the selected object.



A level indicates the Object, Stroke, Fill, and Text opacity settings of the selected object and the applied blending mode, as well as whether transparency effects have been applied. You can hide or display these level settings by clicking the triangle to the left of the word Object (or Group or Graphic, depending on the selection).

8. From the Blending Mode menu, choose Hard Light.



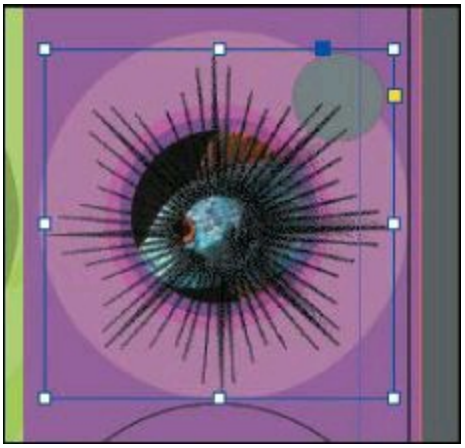


9. Choose Edit > Deselect All, and then choose File > Save to save your work.

Applying transparency to a bitmap graphic

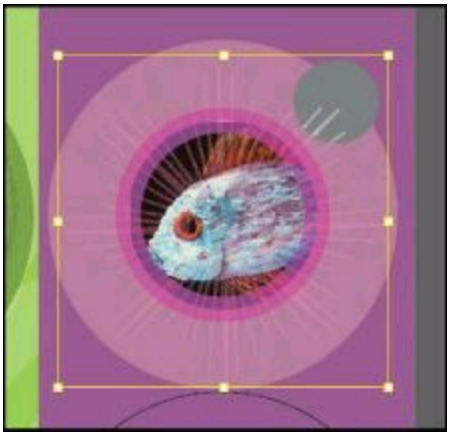
Next you'll apply transparency effects to an imported bitmap graphic. Although this example uses a monochromatic image, you can also apply transparency settings to multicolor photographs. The process is the same as applying transparency effects to any other InDesign object.

1. In the Layers panel, select the Art3 layer. Unlock this layer and make it visible. You can hide or lock either the Art1 layer or the Art2 layer to make it easier to work. Be sure to keep at least one underlying layer visible so that you can see the results of the transparency interactions.
2. Using the Selection tool ( ), select the graphics frame with the black starburst image on the right side of the page.



3. In the Effects panel, enter **70%** as the Opacity value and press Enter or Return.
4. Move the pointer within the content grabber in the middle of the starburst image so that it changes to a hand (), and then click once to select the graphic within the frame.
5. In the Swatches panel, click the Fill box (), and then select the Red color swatch so that red replaces the black areas of the image.

   If other layers are visible below the Art3 layer, you can see the starburst as a muted orange color. If no other layers are visible, the starburst is red.
6. If the starburst image is not still selected, reselect it by clicking within the content grabber.
7. In the Effects panel, choose Screen from the Blending Mode menu and leave the Opacity value at 100%. The starburst changes colors based on the layers that are visible beneath it.
8. Choose Edit > Deselect All, and then choose File > Save to save your work.



Importing and adjusting Illustrator files that use transparency

When you import Adobe Illustrator (.ai) files into an InDesign layout, InDesign recognizes and preserves any transparency settings that were applied in Illustrator. You can also adjust opacity, add a blending mode, and apply additional transparency effects in InDesign.

Now you will place an image of some drinking glasses, and then adjust its transparency.

1. In the Layers panel, make sure that the Art3 layer is the active layer and that the Art3, Art2, Art1, and Background layers are visible.
2. Lock the Art2, Art1, and Background layers to prevent them from being modified.
3. Select the Selection tool () in the Tools panel, and then choose Edit > Deselect All so that the image you import is not placed into a selected frame.

4. Choose View > Fit Page In Window.

Tip

To enable Show Import Options without selecting the option in the Place dialog box, select the image to import, then press the Shift key and click Open.

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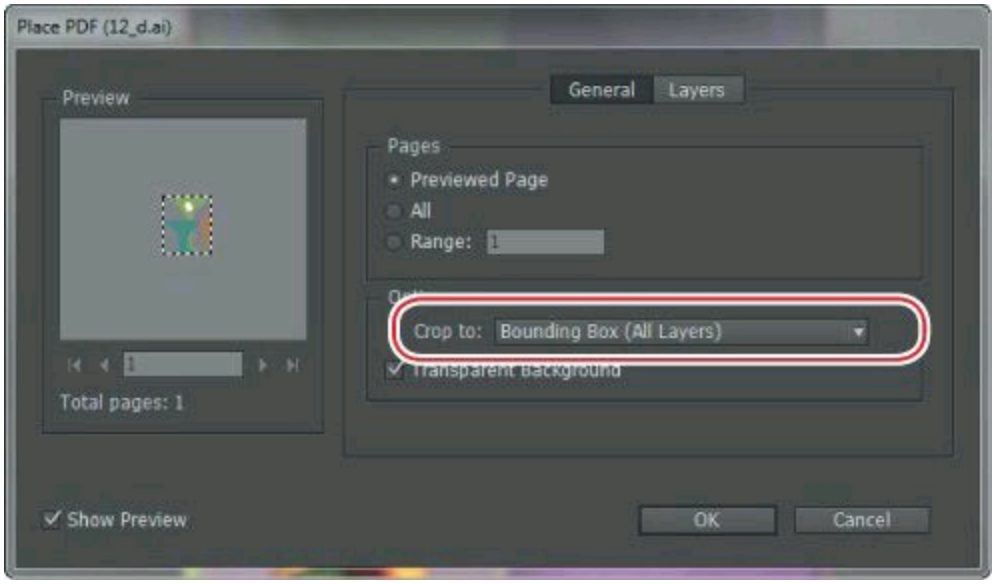
5. Choose File > Place. Select Show Import Options at the bottom of the Place dialog box.
6. Locate the 12_d.ai file in your Lesson12 folder, and double-click to place it.
7. In the Place PDF dialog box, select Bounding Box (All Layers) in the Crop To menu, and make sure that Transparent Background is selected.



8. Click OK. The dialog box closes and the pointer becomes a loaded graphics icon ( ).

Tip

When you're repositioning the image within the purple circle, Smart Guides can help you center the image perfectly within the purple circle.

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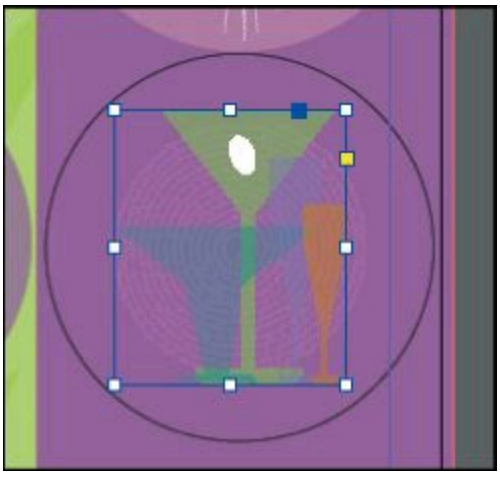
9. Position the loaded graphics icon ( ) within the Light Purple–colored circle on the right side of the page, and then click to place the graphic at full size. Drag the graphics frame to center it visually within the purple circle. Smart Guides are displayed when the frame is centered.



Tip

To show only the Art3 layer and hide all other layers, Alt-click (Windows) or Option-click (Mac OS) the Toggle Visibility icon in the Layers panel.

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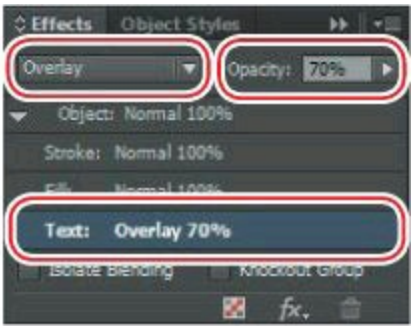
10. In the Layers panel, click to hide the Art2, Art1, and Background layers so that only the Art3 layer is visible, and you can view the placed image on its own and see the transparent color interactions within the Illustrator image.
11. Click to redisplay the Art2, Art1, and Background layers. Notice that the white "olive" shape is completely opaque, whereas the other shapes of the drinking glasses are partly transparent.
12. With the glasses image still selected, change the Opacity setting in the Effects panel to 60%. Keep the image selected.
13. In the Effects panel, choose Color Burn from the Blending Mode menu. Now the colors and interactions of the image take on a completely different character.
14. Choose Edit > Deselect All, and then choose File > Save.

Applying transparency settings to text

Changing the opacity of text is as easy as applying transparency settings to graphic objects in your layout. You'll try out the technique now as you also change the color of the text.

1. In the Layers panel, lock the Art3 layer, and then unlock the Type layer and make it visible.
2. In the Tools panel, select the Selection tool ( ) and then click the text frame "I THINK, THEREFORE I DINE." If necessary, zoom in so that you can read the text easily.

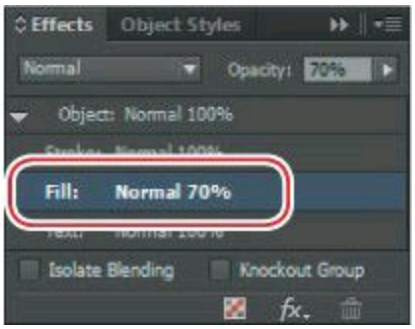
   To apply transparency settings to text or to a text frame and its contents, you must select the frame with the Selection tool. You cannot specify transparency settings when text is selected with the Type tool.
3. In the Effects panel, select the Text level so that any opacity and blending mode changes you make will apply to the text only.
4. Choose Overlay from the Blending Mode menu (it's to the left of the Opacity controls) and change the Opacity to 70%.



5. Double-click the Hand tool to fit the page in the window, and then choose Edit > Deselect All.

   Now you'll change the opacity of a text frame's fill.
6. In the Tools panel, make sure the Selection tool ( ) is selected, and then click the text frame at the bottom of the page that contains "Boston | Chicago | Denver | Houston | Minneapolis." If necessary, zoom in so that you can read the text easily.

7. Select the Fill level in the Effects panel and change the Opacity to 70%.



8. Choose Edit > Deselect All, and then choose File > Save.

Working with effects

So far in this lesson, you've learned how to apply transparency by changing the blending mode and the opacity of objects drawn in InDesign, imported graphics, and text. Another way to apply transparency is by using the nine transparency effects in InDesign. Many of the settings and options for creating these effects are similar.

Transparency effects

Drop Shadow—Adds a shadow that falls behind the object, stroke, fill, or text.

Inner Shadow—Adds a shadow that falls just inside the edges of the object, stroke, fill, or text, giving it a recessed appearance.

Outer Glow and Inner Glow—Add glows that emanate from the outside or inside edges of the object, stroke, fill, or text.

Bevel and Emboss—Add various combinations of highlights and shadows to give text and images a three-dimensional appearance.

Satin—Adds interior shading that makes a satiny finish.

Basic Feather, Directional Feather, and Gradient Feather—Soften the edges of an object by fading them to transparent.

—From InDesign Help

You'll try out some of these effects now, as you fine-tune the menu's artwork.

Applying a basic feather to the edges of an image

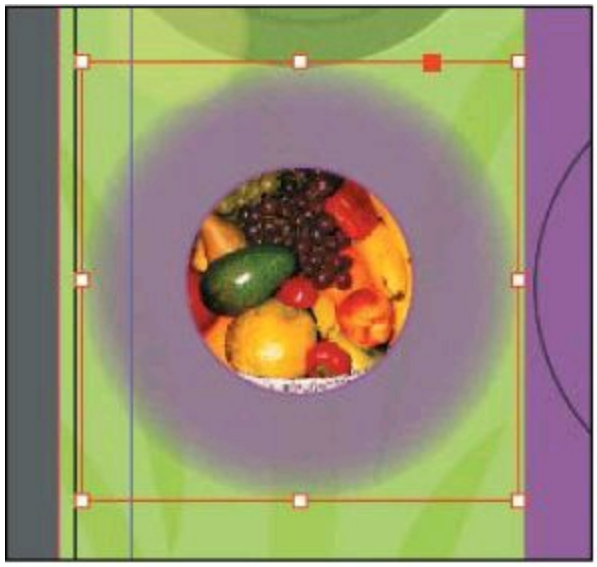
Feathering is another way to apply transparency to an object. Feathering creates a subtle transition from opaque to transparent around the edge of an object, so that any underlying object or the page background is visible through the feathered area. InDesign features three types of feathering:

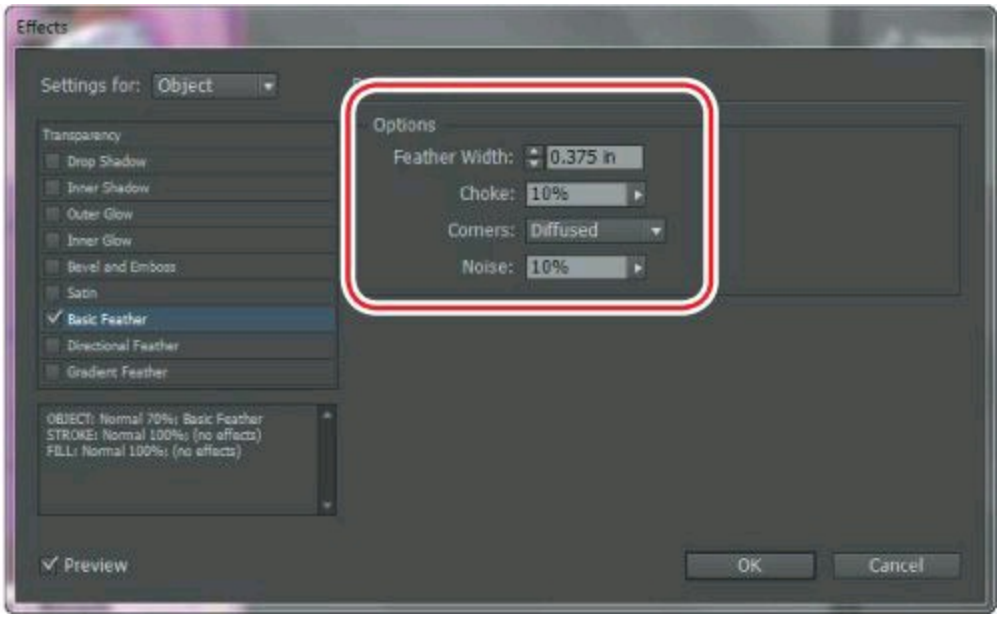
- Basic Feather softens or fades the edges of an object over a distance that you specify.
- Directional Feather softens the edges of an object by fading the edges to transparent from directions that you specify.
- Gradient Feather softens the areas of an object by fading them to transparent.

First, you'll apply Basic Feather, and then you'll move on to Gradient Feather.

1. In the Layers panel, unlock the Art1 layer if it's locked.

2. If necessary, choose View > Fit Page In Window to see the entire page.
3. Select the Selection tool ( ), and then select the Light Purple–filled circle on the left side of the page.
4. Choose Object > Effects > Basic Feather. The Effects dialog box appears, displaying a list of the transparency effects on the left and an accompanying set of controls on the right.
5. In the Options section of the Effects dialog box, set these options:
   - In the Feather Width box, type **0.375 in**.
   - Change both the Choke value and Noise value to **10%**.
   - Leave the Corners option set at Diffused.
6. Make sure that Preview is selected and, if necessary, move the dialog box to view the effects of your changes. Notice how the edges of the purple circle are now blurred.





7. Click OK to apply the settings, and close the Effects dialog box.
8. Choose File > Save.

Applying a gradient feather

You can use the Gradient Feather effect to fade an object from opaque to transparent.

Note

In addition to applying transparency effects by choosing Object > Effects and then choosing an option from the submenu, you can select Effects from the Effects panel menu, or you can click the FX button at the bottom of the Effects panel, and then choose an option from the submenu.

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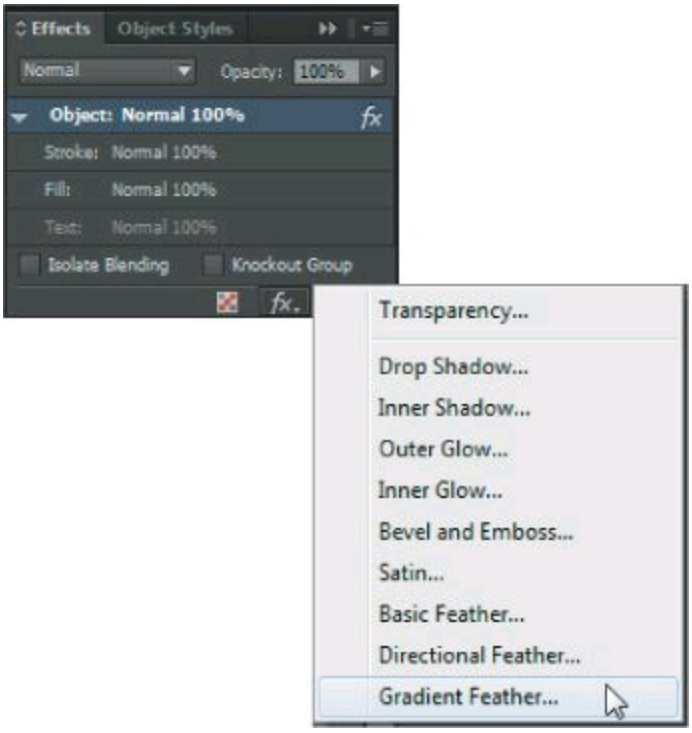
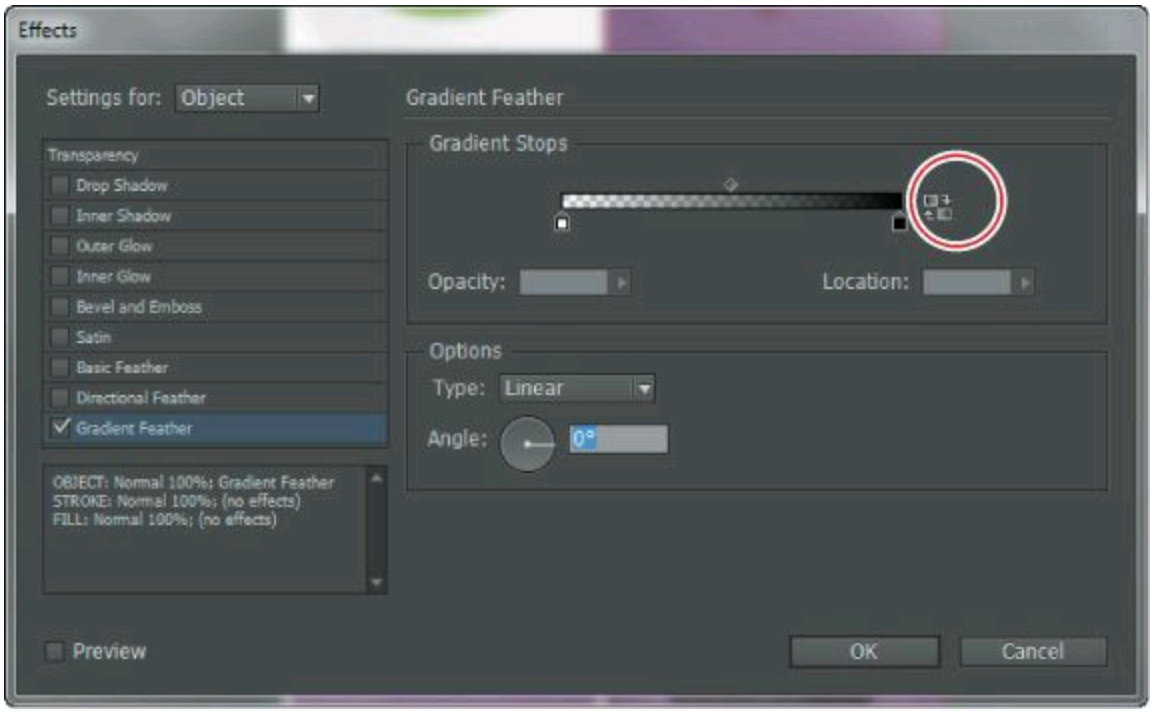
1. Use the Selection tool ( ) to click the Light Purple–filled vertical rectangle that covers the right half of the page.
2. At the bottom of the Effects panel, click the FX button ( ) and choose Gradient Feather from the pop-up menu.

   The Effects dialog box appears, displaying Gradient Feather options.



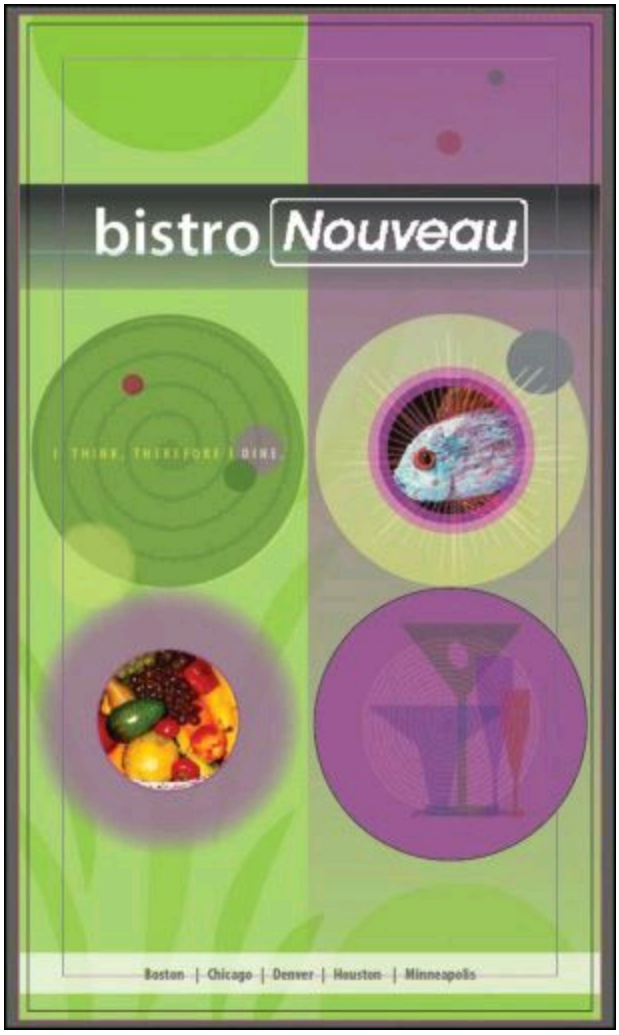
3. In the Gradient Stops section of the Effects dialog box, click the Reverse Gradient button ( ) to reverse the solid and transparent colors.



4. Click OK. The purple rectangle should fade to transparent from right to left.

Now you will use the Gradient Feather tool to adjust the direction of the fade.

5. In the Tools panel, select the Gradient Feather tool ( ). Hold down the Shift key, and drag the pointer from the bottom to the top of the Light Purple rectangle to change the gradient direction.



6. Choose Edit > Deselect All, and then File > Save.

Next, you will apply multiple effects to a single object, and then edit them.

Adding a drop shadow to text

When you add a drop shadow to an object, the result is a 3D effect that makes the object appear to float above the page and cast a shadow on the page and objects below. You can add a drop shadow to any object, and you have the option to assign a shadow independently to an object's stroke or fill or to the text within a text frame.

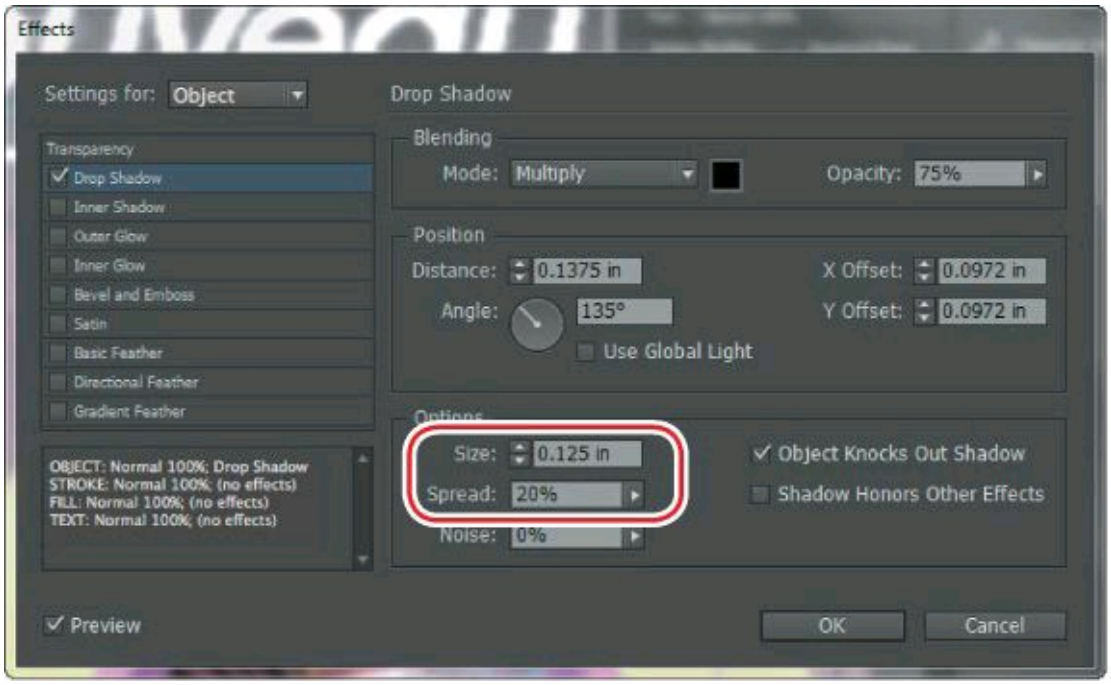
Note

The Effects dialog box allows you to apply multiple effects to a single object and shows you which effects are applied to a selected object (indicated by a check mark on the left side of the dialog box).

Now you'll try this technique by adding a drop shadow to the "bistro" text.

1. Using the Selection tool ( ), select the text frame that contains the word "bistro." Hold down the Z key to temporarily access the Zoom tool, or select the Zoom tool ( ) and magnify the frame so that you can see the text clearly.
2. At the bottom of the Effects panel, click the FX button ( ), and choose Drop Shadow from the menu.
3. In the Options section of the Effects dialog box, enter **0.125 in** for Size and **20%** for Spread.

Make sure that Preview is selected so that you can see the effects on your page.



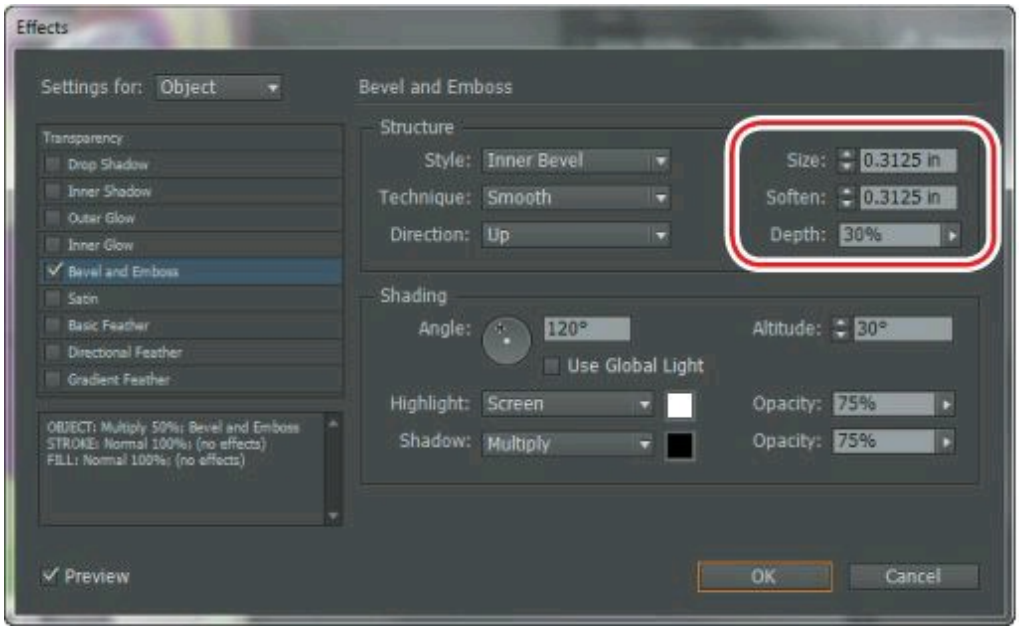
4. Click OK to apply the drop shadow to the text.
5. Choose File > Save to save your work.

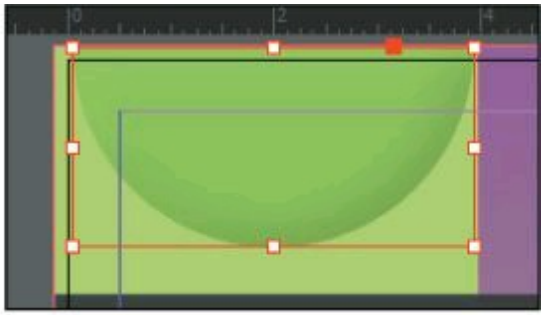
Applying multiple effects to an object

You can apply several different types of transparency effects to an object. For example, you can create the impression that an object is embossed and that it has a glow around it by applying two transparency effects.

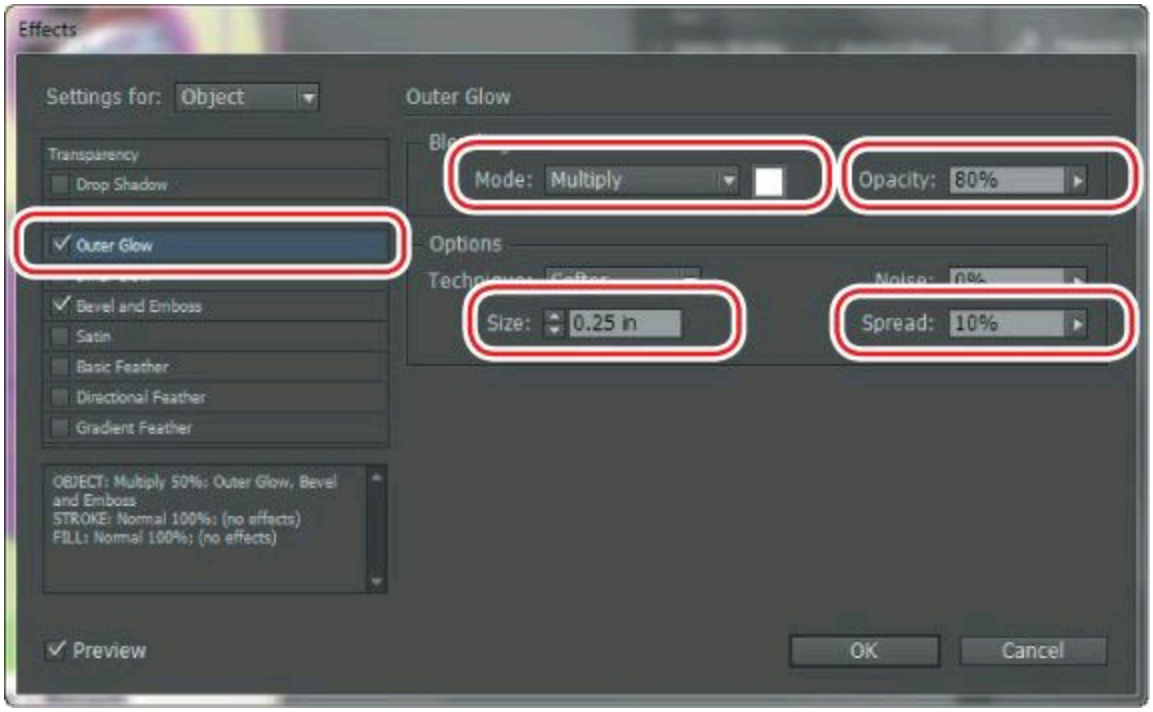
In this exercise, you'll apply an embossed effect and an outer glow effect to the two semicircles on the page.

1. Choose View > Fit Page In Window.
2. Using the Selection tool (), select the Light Green–filled semicircle in the upper-left corner of the page.
3. At the bottom of the Effects panel, click the FX button (), and choose Bevel And Emboss from the menu.
4. In the Effects dialog box, make sure that Preview is selected so that you can view the effects on the page. Then specify the following settings in the Structure section:
   - Size: **0.3125 in**
   - Soften: **0.3125 in**
   - Depth: **30%**





5. Leave the rest of the settings as they are, and keep the Effects dialog box open.
6. On the left side of the dialog box, click the check box to the left of Outer Glow to add an outer glow effect to the semicircle.
7. Click the words Outer Glow to edit the effect, and specify these settings:
   - Mode: **Multiply**
   - Opacity: **80%**
   - Size: **0.25 in**
   - Spread: **10%**



8. Click the Set Glow Color box to the right of the Mode menu. In the Effect Color dialog box, make sure that Swatches is selected in the Color menu, choose Black from the list of colors, and then click OK.
9. Click OK to apply the settings for the multiple effects.

Next, you will apply the same effects to the other semicircle on the page, simply by dragging the

FX icon from the Effects panel to the semicircle.

10. Double-click the Hand tool ( ) to fit the page in the window.

Note

If you miss the semicircle and accidentally apply the effects to another object, choose Edit > Undo Move Object Effects and try again.

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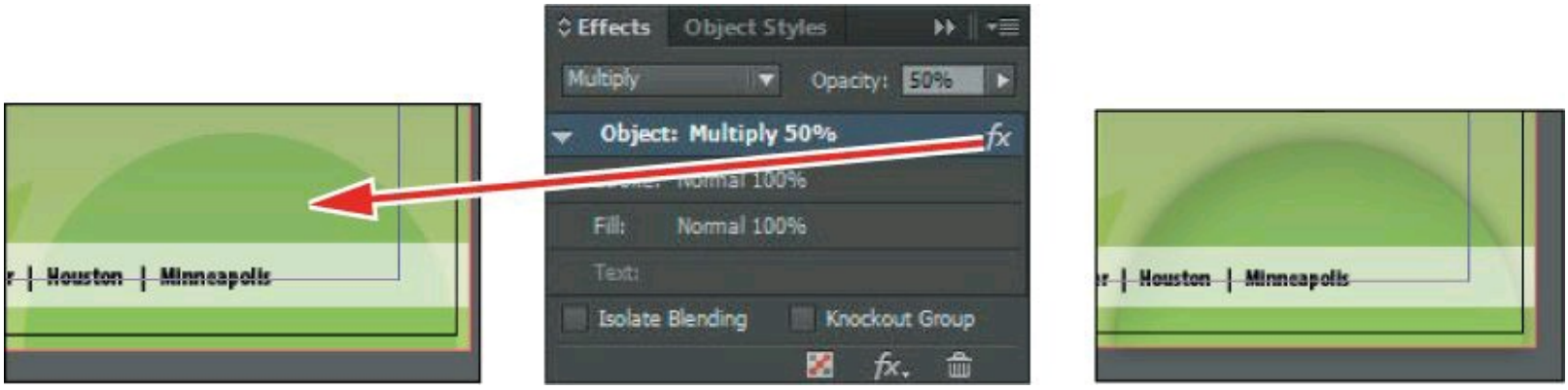
11. In the Tools panel, select the Selection tool ( ). If the green semicircle in the upper-left corner of the page is not still selected, select it now.
12. With the Effects panel open, drag the FX icon ( ) on the right side of the Object level to the page and directly on top of the green semicircle in the lower-right corner.



Dragging the FX icon onto the semicircle (left and center) yields the result seen here (right).

Now you will apply the same effects to the small gray circle on the page.

13. In the Layers panel, click the eye icon ( ) to turn off the visibility for the Art3 layer, and then unlock the Art2 layer.
14. Make sure the green semicircle in the upper-left corner of the page is still selected. Drag the FX icon ( ) from the Effects panel onto the small gray circle above and to the right of the fish image.
15. Choose File > Save.

Editing and removing effects

Effects that are applied can easily be edited or removed. You can also quickly check whether any effects have been applied to an object.

First, you'll edit the gradient fill behind the restaurant title, and then you'll remove the effects applied to one of the circles.

1. In the Layers panel, make sure that the Art1 layer is unlocked and that it is visible.
2. With the Selection tool ( ), click the frame with the gradient fill that's behind the text "bistro Nouveau."

Tip

To quickly see which pages in your document contain transparency, choose Panel

Options from the Pages panel menu, and select the Transparency check box. A small icon will appear next to any pages containing transparency.

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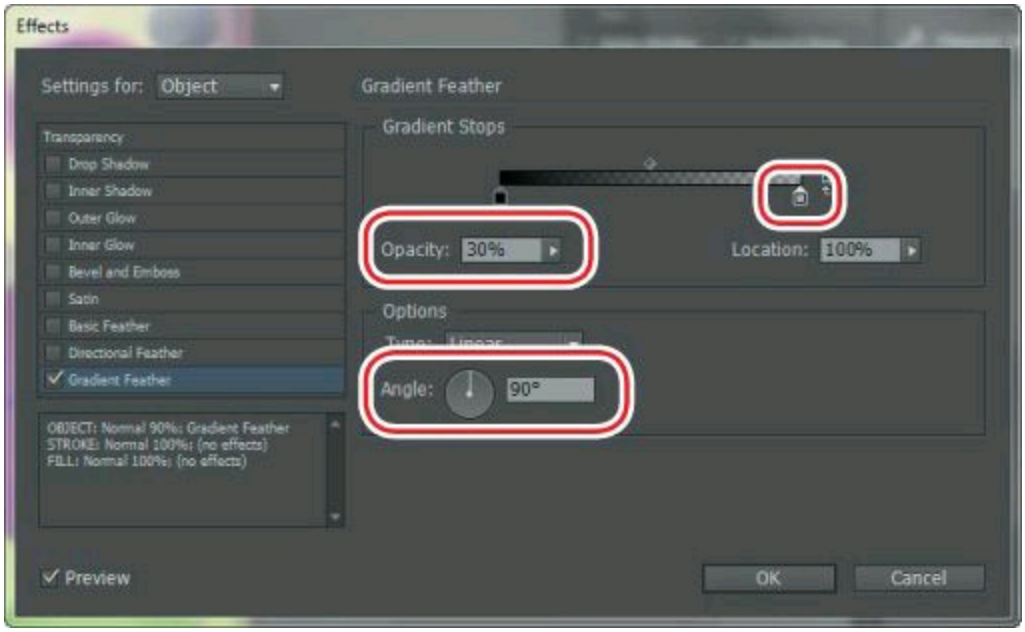
3. With the Effects panel open, click the FX button (fx) at the bottom of the panel. In the menu that appears, the Gradient Feather effect has a check mark next to it, which indicates that it is already applied to the selected object. Choose the Gradient Feather option from the menu.
4. In the Effects dialog box, under Gradient Stops, click the color stop (the small white square) at the right end of the gradient ramp. Change Opacity to **30%**, and change Angle to **90°**.



5. Click OK to update the Gradient Feather effect.

Now you will remove all of the effects applied to an object.

6. In the Layers panel, turn on visibility for all layers and unlock all layers.
7. Choose the Selection tool (). While holding down the Ctrl key (Windows) or Command key (Mac OS), click the small gray circle to the right and above the fish image on the right side of the page. Your first click will select the rectangular frame above the circle. Click again within the small circle to select it.

Note

The Clear Effects button also removes blending mode and opacity setting changes from the object.

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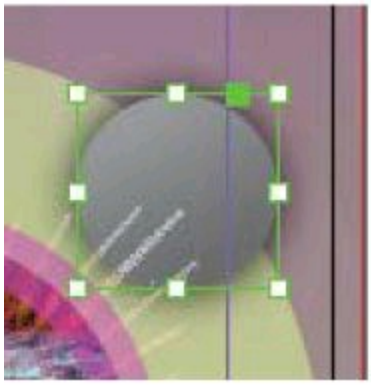
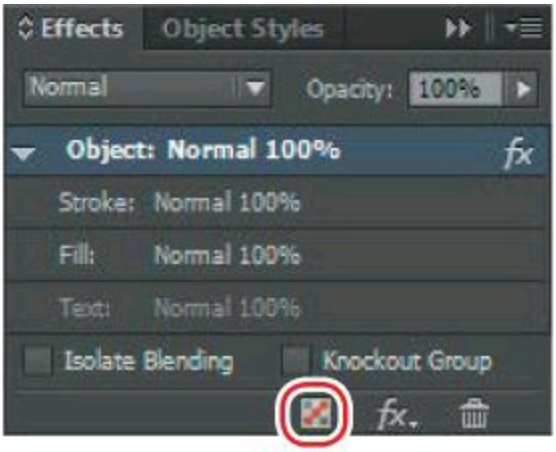
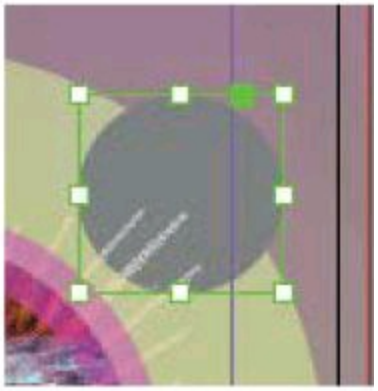
8. At the bottom of the Effects panel, click the Clear Effects button () to remove all of the effects applied to the circle.







9. Choose File > Save.

Congratulations! You have completed the lesson.

Exploring on your own

Try some of the following ways of working with InDesign transparency options:

1. Scroll to a blank area of the pasteboard and create some shapes (by using the drawing tools or by importing new copies of some of the image files used in this lesson) on a new layer. Apply fill colors to any shapes that don't have content, and position your shapes so that they overlap each other, at least partially. Then:
   - Select the uppermost object in your arrangement of shapes. Using the controls in the Effects panel, experiment with other blending modes, such as Luminosity, Hard Light, and Difference. Then select a different object and choose the same blending modes in the Effects panel to compare the results. When you have a sense of what the various modes do, select all of your objects, and choose Normal as the blending mode.
   - In the Effects panel, change the Opacity value of some of the objects but not others. Then select different objects in your arrangement and use the Object > Arrange > Send Backward and Object > Arrange > Bring Forward commands to observe different results.
   - Experiment with combinations of different opacities and different blending modes applied to an object. Do the same with other objects that partially overlap the first object, to explore the variety of effects you can create.
2. In the Pages panel, double-click page 1 to center it in the document window. In the Layers panel, click the eye icons for the different Art layers one at a time to see the differences this creates in the overall effect of the layout.
3. In the Layers panel, make sure that all the layers are unlocked. In the layout, click the image of the glasses to select it. Use the Effects panel to apply a drop shadow.

Review questions

1. How do you change the color of the white areas of a grayscale image? How do you change the gray areas?
2. If you've applied transparency effects to an object, what is the easiest way to apply the same effects to a different object?
3. What is the importance of the stacking order of layers and of objects within layers when you

work with transparency?

4. What's the quickest and easiest way to remove transparency effects from an object to which multiple effects are applied?

Review answers

1. To change the white areas, select the graphics frame with the Selection tool, click the Fill box in the Tools panel or Swatches panel, and then select a color in the Swatches panel. To change the gray areas, select the content within the frame by clicking within the content grabber, and then select the color from the Swatches panel that you want to use.
2. Select the object to which you've applied transparency effects, and then drag the FX icon displayed on the right side of the Effects panel to another object.
3. The transparency of an object affects the view of objects below (behind) it in the stacking order. For example, objects below a semitransparent object can be seen behind it—like objects behind a colored plastic film. An opaque object blocks the view of the area behind it in the stacking order, regardless of whether the objects behind it have reduced opacity values, feathering, blending modes, or other effects.
4. Select the object, and then click the Clear Effects button at the bottom of the Effects panel.

13. Printing and Exporting

Lesson Overview

In this lesson, you'll learn how to do the following:

- Check a document for potential printing issues.
- Confirm that an InDesign file and all of its elements are ready for printing.
- Assemble all necessary files for printing or delivery to a service provider or printer.
- Generate an Adobe PDF file for proofing.
- Preview a document onscreen before printing.
- Select appropriate print settings for fonts and graphics.
- Print a proof of a document.
- Create a print preset to automate the printing process.
- Manage the colors in a document.

This lesson will take approximately 45 minutes.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the Getting Started section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.

Adobe InDesign CC provides advanced printing and print preparation controls to manage your print settings, regardless of your output device. You can easily output your work to a laser or inkjet printer, high-resolution film, or a computer-to-plate imaging device.

Getting started

In this lesson, you'll work on a magazine cover that contains a full-color image and also uses a spot color. The document will be printed on a color inkjet or laser printer for proofing and also on a high-resolution imaging device, such as a platesetter used in offset printing. Prior to printing, the document will be exported to a PDF file that can be used in a review process.

1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

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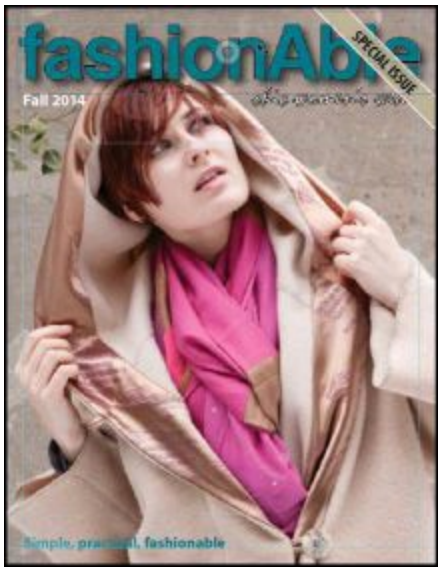
2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced.
3. Choose File > Open and open the 13_Start.indd file in the Lesson13 folder, located inside the Lessons folder within the InDesignCIB folder on your hard drive. (If the Adobe Typekit dialog box displays, click Sync Fonts.)
4. An alert message informs you that the document contains missing and modified links. Click Don't Update Links. You will correct these problems later in this lesson.

Tip

A preference option in InDesign lets you control whether an alert is displayed when you open a document with missing or modified links. To disable the alert, deselect the Check Links Before Opening Document option in the File Handling section of the Preferences dialog box.

When you print an InDesign document or generate a PDF file for printing, InDesign must access the original artwork that was placed in the layout. If imported artwork has been moved, graphic filenames have changed, or the location of the original graphic files is no longer available, InDesign alerts you that the original artwork cannot be located or has been modified. This alert appears when a document is opened, printed, exported, or checked for printing using the Preflight panel. InDesign shows the status of all files necessary for printing in the Links panel.

5. Choose File > Save As, rename the file **13_Cover.indd**, and save it in the Lesson13 folder.



Preflighting files

InDesign provides integrated controls for performing a quality check on a document prior to printing

or handing off the document to a print service provider or digital publishing with Adobe DPS. *Preflight* is the standard industry term for this process. In "Preflighting as you work," in Lesson 2, you learned how you can take advantage of the live preflight capabilities in InDesign. This lets you monitor a document as you create it to prevent potential printing problems from occurring.

You can use the Preflight panel to confirm that all graphics and fonts used in the file are available for printing and exporting and that there are no instances of overset text. Here, you'll use the Preflight panel to identify a pair of missing graphics in the sample layout.

Tip

You can also access the Preflight panel by double-clicking "3 errors" at the bottom of the document panel, or by selecting it from the pop-up menu.

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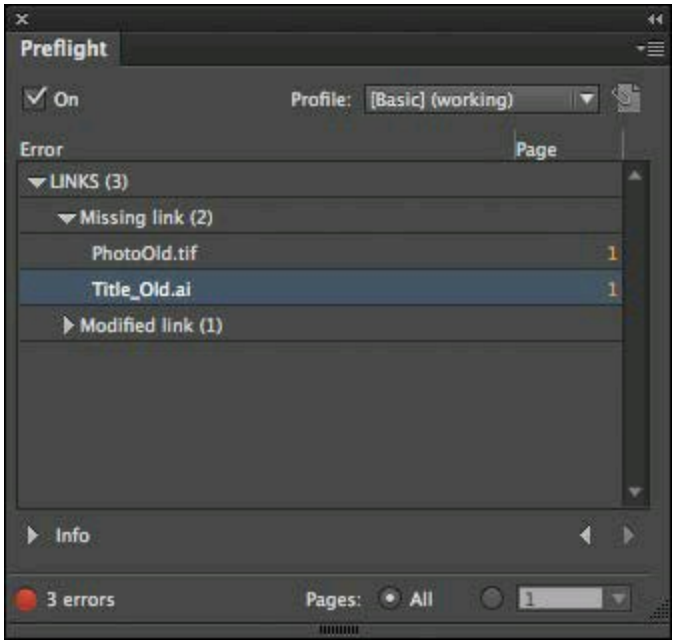
1. Choose Window > Output > Preflight.
2. In the Preflight panel, make sure that On is selected and confirm that [Basic] (Working) is selected in the Profile menu. Notice that one error is listed (Links). The 3 in parentheses indicates that there are three link-related errors.

   Notice that no text errors appear in the Error section, which confirms that the document has no missing fonts and no overset text.
3. Click the triangle to the left of Links, then click the triangle to the left of Missing Link to display the names of the two missing graphic files. Double-click the Title_Old.ai link name; this centers the graphic in the document window and selects the graphics frame.



4. At the bottom of the Preflight panel, click the triangle to the left of Info to display information about the missing file.

   In this case, the problem is a missing graphic file, and the fix is to use the Links panel to find the linked file. Now you'll replace this outdated version of the magazine's title with a revised version that includes a color change.
5. If the Links panel isn't open, click the Links panel icon or choose Window > Links to open it. Make sure that the Title_Old.ai file is selected in the Links panel, and then choose Relink from the panel menu. Browse to the Links folder inside the Lesson13 folder. Double-click the

Title_New.ai file. The new file is now linked, replacing the original file.

Note

Graphics that have been modified or are missing are displayed in low-resolution regardless of the current Display Performance setting.

Notice that after you relink the Title_New.ai graphic, the new magazine title is a different color and is displayed at low resolution, the default setting for imported Adobe Illustrator files.

6. To display the document at high resolution, choose View > Display Performance > High Quality Display.
7. Repeat steps 5 and 6 to relink the cover photograph named PhotoOld.tif with a slightly different version with higher contrast named PhotoNew.tif.
8. In the Preflight panel, click the triangle to the left of Modified Link. The graphic named Tagline.ai has been modified. To update the link to this graphic ("chic women's wear"), select it in the Links panel and then choose Update Link from the panel menu.

9. Choose File > Save to save the changes you've made to the document and close the Preflight panel.

Creating a preflight profile

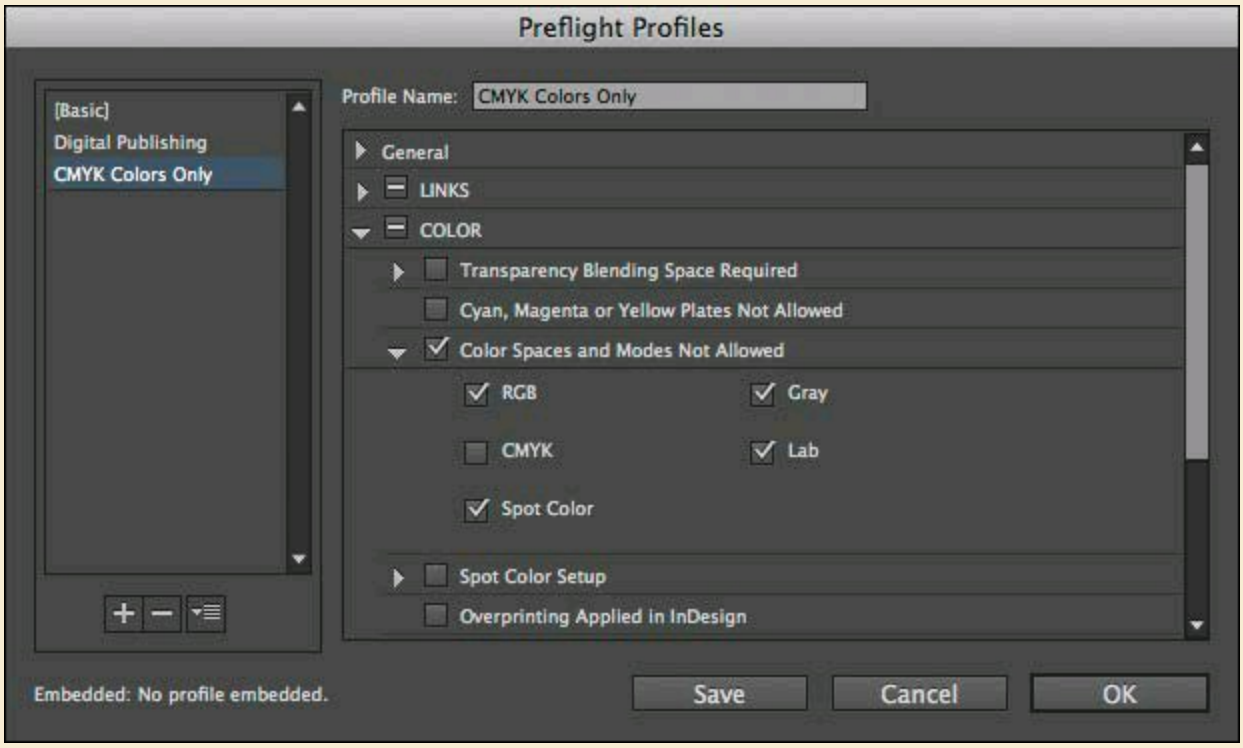
When the live preflight feature is enabled (that is, when On is selected in the Preflight panel), the default working profile, called [Basic], is used to preflight your InDesign documents. This profile checks for basic output conditions, such as missing or modified graphic files, unresolved caption variables, overset text, and missing fonts.

You can also create your own custom preflight profiles or load profiles from your print service provider or another source. When you create a custom preflight profile, you specify the conditions you want to detect. Here's how to create a profile that alerts you when non-CMYK colors are used in a layout:

1. If the Preflight panel is not open, choose Window > Output > Preflight, and then choose Define Profiles from the Preflight panel menu.
2. Click the New Preflight Profile button ( ) on the lower-left side of the Preflight Profiles dialog box to create a new preflight profile. In the Profile Name box, enter **CMYK Colors Only**.
3. Click the triangle to the left of Color to display color-related options, and select Color

Spaces And Modes Not Allowed.

4. Click the triangle to the left of Color Spaces And Modes Not Allowed, select the accompanying box, and then select all of the available options except CMYK (RGB, Gray, Lab, and Spot Color).



5. Leave existing preflight criteria for Links, Images And Objects, Text, and Document as is. Click Save, and then click OK.
6. Choose CMYK Colors Only from the Profile menu in the Preflight panel. Notice the additional errors that are listed in the Error section of the panel.
7. Click the triangle next to Color to expand the display, and then click the triangle next to Color Space Not Allowed to see a list of objects that do not use the CMYK color model. Click various objects to view information about the problem and how to fix it. (Make sure the Info section of the Preflight panel is visible. If not, click the triangle to the left of Info to display it.)
8. When you're done viewing information, choose [Basic] (working) from the Profile menu to return to the default profile used for this lesson.

Packaging files

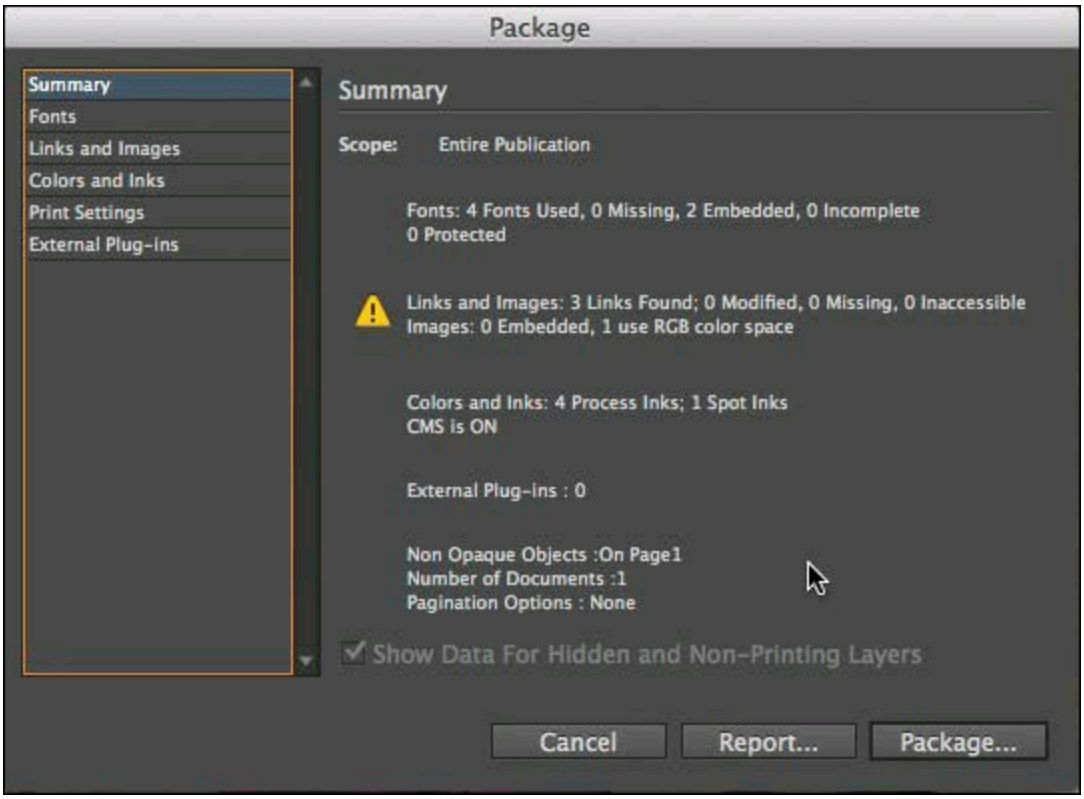
You can use the Package command to assemble a copy of your InDesign document and all linked items, including graphics, into a single, convenient folder. InDesign also copies the fonts needed for printing. Now you'll package the files for the magazine cover in preparation for sending them to your print provider. This ensures that all project components required for output are provided.

Note

Typekit Desktop fonts that are available as part of your Creative Cloud membership are not included when you use the Package command.

1. Choose File > Package. The Summary section of the Package dialog box notifies you of one more printing-related issue:

   Because the document contains an RGB graphic, InDesign alerts you to its presence. You'll convert this image to CMYK when you print the cover later in this lesson.



2. Click Package.
3. In the Printing Instructions dialog box, type a filename for the file that accompanies the InDesign document (for example, "Info for Printer") in the Filename field, and also include your contact information. Click Continue.

Tip

If you need to change any printing instructions, you can display the Printing Instructions dialog box by clicking the Instructions button in the Create Package Folder dialog box.

InDesign uses this information to create an instructions text file that will accompany the InDesign file, links, and fonts in the package folder. The recipient of the package can use the instructions file to better understand what you want done and how to contact you if there are questions.

4. In the Create Package Folder dialog box, browse to locate the Lesson13 folder. Notice that the folder that will be created for the package is named 13_Cover Folder. InDesign automatically names the folder based on the document name, which you assigned at the beginning of this lesson.

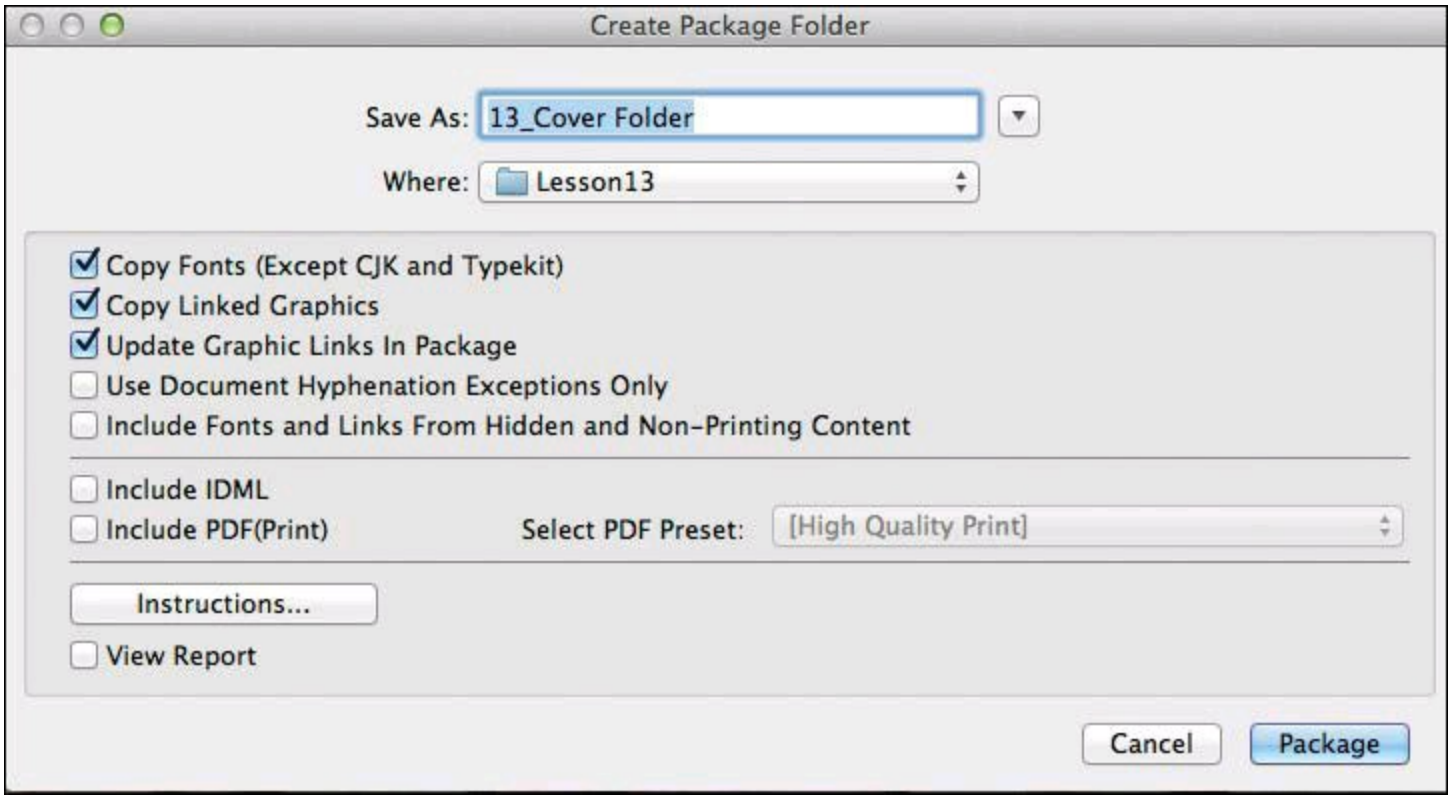
Tip

When Copy Fonts (Except CJK and Typekit) is selected in the Create Package Folder dialog box, InDesign generates a folder called "Document fonts" in the package folder. If you open an InDesign file located in the same folder with the Document fonts folder,

InDesign will activate these fonts for you and makes them available only for that document while it's open.

---

5. Confirm that the following options are selected:
   - Copy Fonts (Except CJK and Typekit)
   - Copy Linked Graphics
   - Update Graphic Links In Package
6. Deselect Include IDML and Include PDF(Print).



7. Click Package.

Tip

The options to include IDML and PDF files in a package are new in InDesign CC (2014 Release). You can open exported .idml files in previous versions of InDesign. If you choose to include a PDF, you can select a PDF preset from the accompanying menu.

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8. Read the warning message that informs you about the licensing restrictions that may affect your ability to copy fonts, and then click OK.
9. Switch to Explorer (Windows) or Finder (Mac OS), and then navigate to the 13_Cover Folder in the Lesson13 folder (located inside the Lessons folder within the InDesignCIB folder on your hard drive). Open the folder.

   Notice that InDesign created a duplicate version of your document and also copied all fonts, graphics, and other linked files necessary for high-resolution printing. Because you selected Update Graphic Links In Package, the duplicate InDesign file now links to the copied graphic files located in the package folder instead of to the original linked files. This makes the document easier for a printer or service provider to manage and also makes the package file

ideal for archiving.

10. When you have finished viewing its contents, close 13_Cover Folder and return to InDesign.

Creating an Adobe PDF proof

If your documents need to be reviewed by others, you can easily create Adobe PDF (Portable Document Format) files to transfer and share. There are several benefits to this convenient format: Files are compressed to a smaller size, all fonts and graphic links are self-contained in a single composite file, and files are displayed onscreen and print the same whether opened on a PC or a Mac. InDesign exports directly to Adobe PDF.

Saving a composite of your publication as an Adobe PDF document also has many advantages for printing. You can create a compact, reliable file that you or your service provider can view, edit, organize, and proof. Then later, your service provider can either output the Adobe PDF file directly or process it using tools from various sources for such post-processing tasks as preflight checks, trapping, imposition, and color separation.

You will now create an Adobe PDF file that is suitable for review and proofing purposes.

1. Choose File > Export.
2. Choose Adobe PDF (Print) from the Save As Type (Windows) or Format (Mac OS) menu, and for the filename, type **13_Cover_Proof.pdf**. If necessary, navigate to the Lesson13 folder, and then click Save. The Export Adobe PDF dialog box opens.

Note

The presets available in the Adobe PDF Preset menu are used for creating a range of Adobe PDF files, from small files suitable for onscreen viewing to press-ready files that are suitable for high-resolution output.

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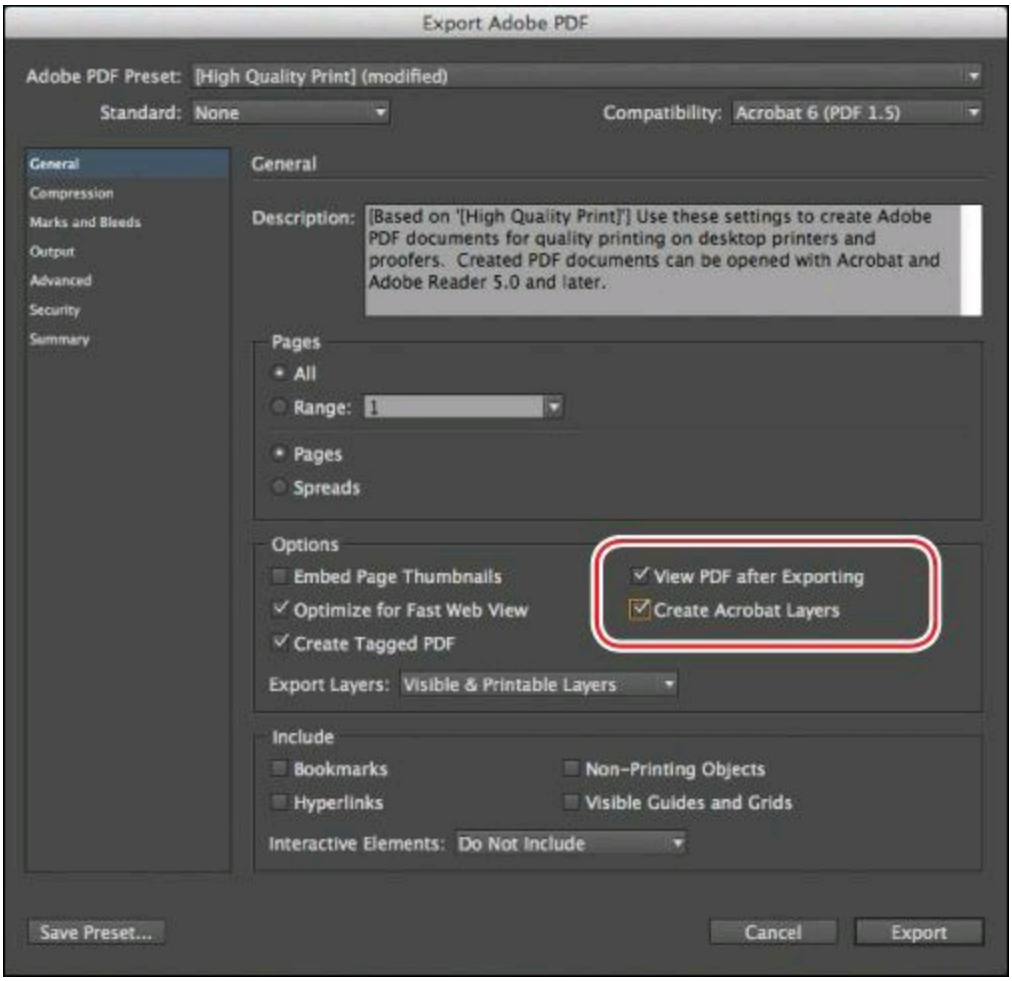
3. In the Adobe PDF Preset menu, choose [High Quality Print]. This setting creates PDF files that are suitable for output on desktop printers and proofers and onscreen proofing.
4. In the Compatibility menu, choose Acrobat 6 (PDF 1.5). This is the earliest version that supports more advanced features in the PDF file, including layers.
5. In the Options section of the dialog box, select
   - View PDF After Exporting
   - Create Acrobat Layers

Note

Adobe PDF (Print) export in InDesign is performed in the background, which enables you to continue working while an Adobe PDF is being created. If you try to close your document before the background process is completed, InDesign will display a warning message.

Automatically viewing the PDF file after exporting is an efficient way of checking the results of the file export process. The Create Acrobat Layers option converts the layers in the InDesign

layout into layers that can be displayed (or hidden) in the resulting PDF file.



The Export Layers menu lets you choose the layers to be exported when creating the PDF. For this exercise, use the default option: Visible & Printable Layers.

Tip

You can view the export progress from the Window > Utilities > Background Tasks panel.

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6. Click Export. An Adobe PDF file is generated and displays on your monitor in Adobe Acrobat or Adobe Reader.
7. Review the Adobe PDF, and then return to InDesign.

Viewing a layered Adobe PDF file using Adobe Acrobat and Adobe Reader

Using layers in an InDesign document (Window > Layers) can help you organize the text and graphic elements in a publication. For example, you can place all text elements on one layer and all graphic elements on another. The ability to show/hide and lock/unlock layers gives you further control over the design elements. In addition to showing and hiding layers in InDesign, you can show and hide layers in InDesign documents that have been exported as Adobe PDFs by opening the documents with Adobe Acrobat. Use the following steps to view the layers in the Adobe PDF file you just exported (13_Cover_Proof.pdf).

1. Click the Layers icon ( ) along the left side of the document window, or choose View > Show/Hide > Navigation Panes > Layers, to display the Layers panel.

2. Choose View > Zoom > Fit Height to display the entire page.
3. Click the plus sign (Windows) or the triangle (Mac OS) to the left of the document name in the Layers panel.

   The layers in the document are displayed.
4. Click the eye icon ( ) to the left of the Text layer. When the icon is hidden, so are all objects on this layer.
5. Click the empty box to the left of the Text layer to turn the visibility back on for the text.
6. Choose File > Close to close the document. Return to InDesign.

Previewing separations

If your documents need to be color-separated for commercial printing, you can use the Separations Preview panel to gain a better understanding of how each portion of the document will print. You'll try out this feature now.

1. Choose Window > Output > Separations Preview.
2. Select Separations from the View menu in the Separations Preview panel. Move the panel so that you can see the page, and adjust the panel's height so that all of the listed colors are visible. If it's not already selected, choose View > Fit Page In Window.

3. Click the eye icon ( ) next to CMYK to hide all page elements that use CMYK colors, and show only elements to which spot (Pantone) colors are applied.

Tip

If you choose Ink Limit from the View menu in the Separations Preview panel, InDesign displays in red areas that exceed the specified maximum ink percentage. (The default Ink Limit value is 300%.)

4. Click the eye icon next to Pantone 3155 C. No elements are displayed on the page, indicating that this color is applied to all of the remaining elements.

   You may have noticed that two of the Pantone colors share the same number. While these are similar colors, they represent two kinds of ink, intended for different print uses. This may cause confusion at output or incur the expense of unwanted printing plates. You will correct this later using the Ink Manager.

5. Choose Off from the View menu in the Separations Preview panel to enable viewing of all colors.

Previewing how transparency effects will be flattened

Documents that contain objects to which transparency effects, such as opacity and blending modes, have been applied usually need to undergo a process called *flattening* when they are printed or exported. Flattening divides transparent artwork into vector-based areas and rasterized areas.

Some of the objects in this magazine cover have been modified using transparency effects. Next, you'll use the Flattener Preview panel to determine the objects to which transparency effects have been applied and the areas on the page that are affected by transparency.

1. Choose Window > Output > Flattener Preview.
2. If the entire page is not visible in the document window, double-click the Hand tool ( ) to fit the document to the current window size, and position the Flattener Preview panel so that you can see the entire page.
3. In the Flattener Preview panel, choose Transparent Objects from the Highlight menu.
4. If it's not already selected, choose [High Resolution] from the Preset menu. You'll use this setting again later in this lesson when printing this file.

   Notice how two of the objects at the top of the page are displayed with a red highlight. These are objects to which transparency effects, such as a blending mode, opacity, and drop shadow or any of nine additional special effects, are applied. You can use this highlight to help identify areas of your layout that may be unintentionally affected by transparency, so that you can adjust either your layout or your transparency settings accordingly.

Tip

To prevent an object, such as a text frame, from being affected by transparency, you can arrange it so it is above the transparent object in the stacking order. Either move it forward or to the front (Object > Arrange) or place it on a higher layer.

Transparency can be applied in Photoshop, in Illustrator, or directly in the InDesign layout. The Flattener Preview panel identifies transparent objects, regardless of whether the transparency was created using InDesign or imported from another application.

5. Choose None from the Highlight menu to disable the flattener preview.

About transparency flattener presets

If you regularly print or export documents that contain transparency, you can automate the flattening process by saving flattening settings in a *transparency flattener preset.* You can then apply these settings for print output as well as for saving and exporting files to PDF 1.3 (Acrobat 4.0) and EPS and PostScript formats. In addition, in Illustrator you can apply them when saving files to earlier versions of Illustrator or when copying to the clipboard; in Acrobat, you can also apply them when optimizing PDFs.

These settings also control how flattening occurs when you export to formats that don't support transparency.

You can choose a flattener preset in the Advanced panel of the Print dialog box or of the format-specific dialog box that appears after the initial Export or Save As dialog box. You can create your own flattener presets or choose from the default options provided with the software. The settings of each of these defaults are designed to match the quality and speed of the flattening with an appropriate resolution for rasterized transparent areas, depending on the document's intended use:

[High Resolution] is for final press output and for high-quality proofs, such as separations-based color proofs.

[Medium Resolution] is for desktop proofs and print-on-demand documents that will be printed on PostScript color printers.

[Low Resolution] is for quick proofs that will be printed on black-and-white desktop printers and for documents that will be published on the web or exported to SVG.

—From InDesign Help

Previewing the page

Now that you've previewed the color separations and areas of transparency in the layout, you'll preview the page to get an idea of how the final cover will look when printed.

1. If you need to change the display magnification to fit the page to the document window, double-click the Hand tool ().

Tip

You can also toggle between the different screen modes by choosing a mode from the Screen Mode widget in the Application bar.

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2. At the bottom of the Tools panel, click and hold down the Screen Mode button ( ), and then choose Preview () from the menu. All guides, frame edges, and other nonprinting items are hidden.
3. Click and hold down the Mode button, and then choose Bleed ( ). Additional space outside the perimeter of the final document size is displayed. This confirms that the color background extends beyond the edge of the document, ensuring complete coverage in the printed piece. After the job is printed, this excess area is trimmed to the final printed size.

Tip

It is common to set up bleed and slug areas when you create a new InDesign document. After you choose File > New > Document click the triangle to the left of Bleed And Slug in the New Document dialog box to display bleed and slug controls.

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4. Click and hold down the Mode button, and then choose Slug ( ). The page now displays additional space below the bottom of the page. This additional area is often used to provide production information about the job. Use the scroll bar on the right side of the document window to see this area. If you want to set up the bleed or slug areas in an existing file, choose File > Document Setup and click Bleed And Slug to reveal the bleed and slug setup options.
5. Double-click the Hand tool ( ) to fit the entire page to the document window.

After confirming that the file looks acceptable, you are ready to print it.

Printing a laser or inkjet proof

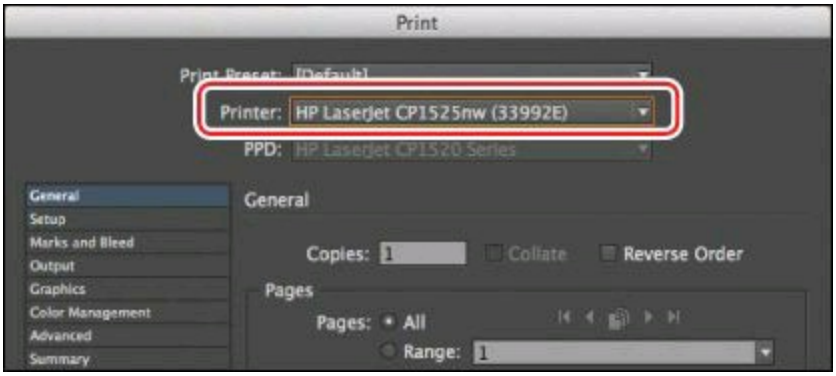
InDesign makes it easy to print documents to a variety of output devices. In this part of the lesson, you'll create a print preset to save settings—and save time in the future—without having to individually set each option for the same device.

1. Choose File > Print.
2. From the Printer menu in the Print dialog box, choose your inkjet or laser printer.

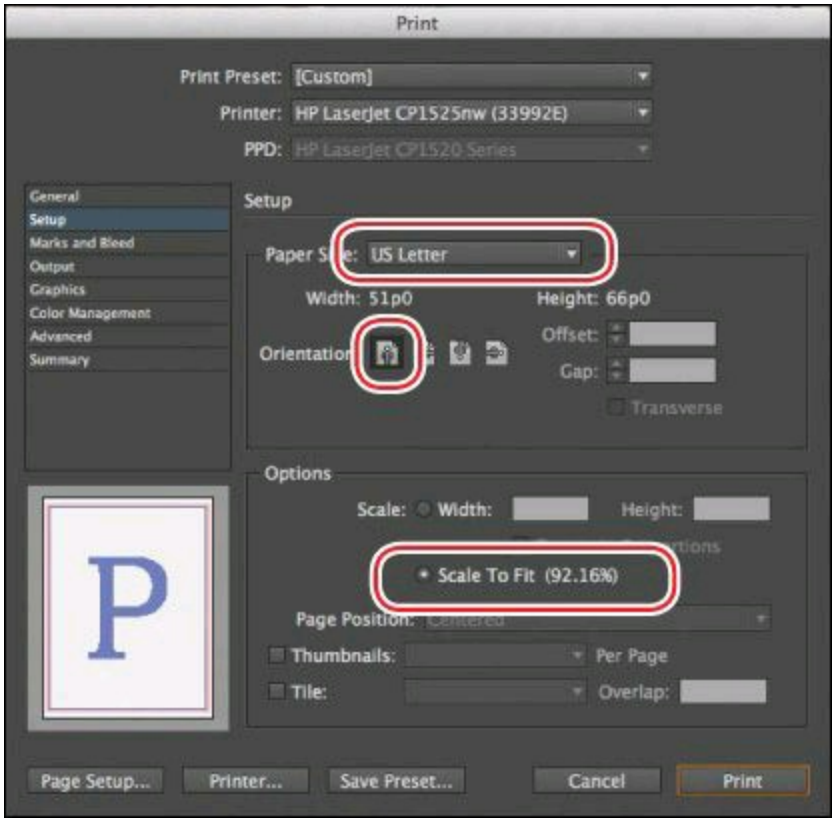
Note

If you do not have access to a printer, you can choose PostScript File® from the Printer menu. If you do, you can choose an Adobe PDF PPD (if available) and complete all of the steps in the remainder of the lesson. If no other PPDs are available, you can choose the Device Independent PPD; however, some of the controls covered in the remainder of the lesson are not available if you choose Device Independent.

Notice how InDesign automatically selects the PPD (printer description) software that was associated with this device at the time you installed the equipment.



3. On the left side of the Print dialog box, click the Setup category, and then choose the following options:
   - Paper Size: US Letter
   - Orientation: Portrait ( )
   - Scale To Fit



4. On the left side of the Print dialog box, click the Marks And Bleed category, and then choose these options:

- Crop Marks
- Page Information
- Use Document Bleed Settings

Tip

The preview pane in the lower-left corner of the Print dialog box shows how the page area, marks, and bleed area will print.

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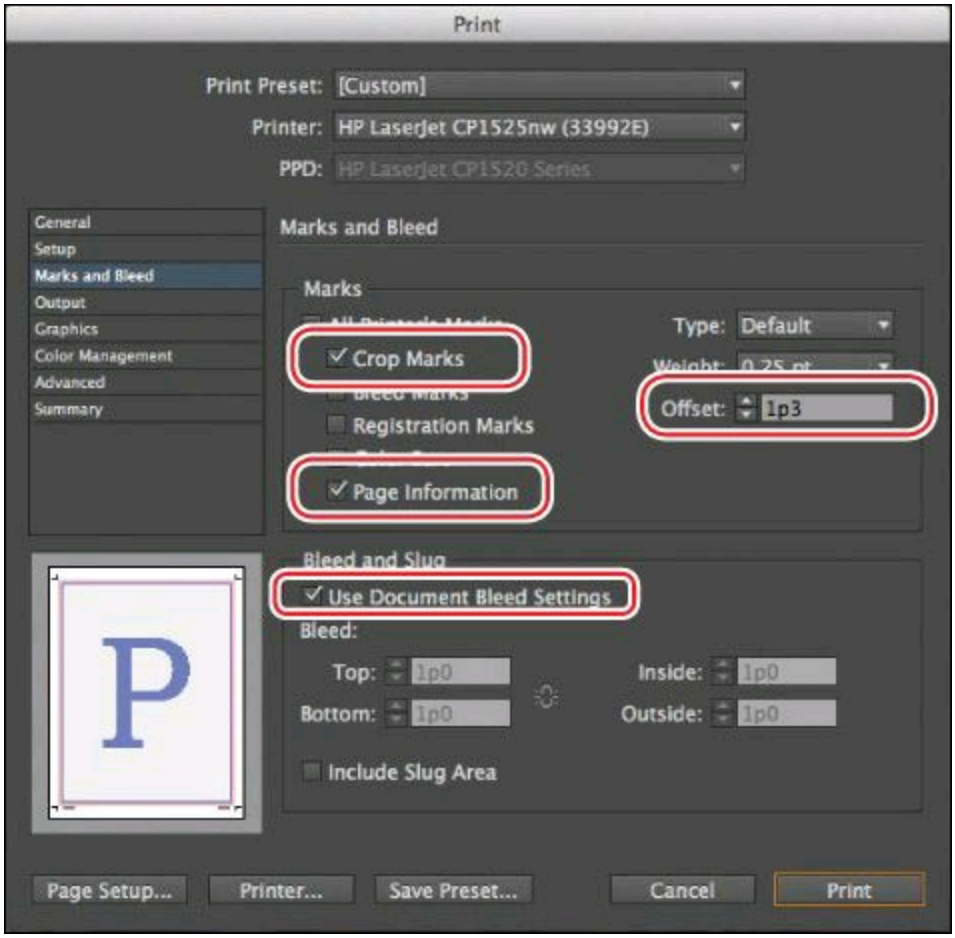
5. In the Offset box, enter a value of **1p3**. This value determines the distance beyond the page edges where the specified marks and page information appear.

The crop marks print outside of the page area and provide guides showing where the final document is trimmed after printing. The page information automatically adds the document name and the page number, along with the date and time it was printed, to the bottom of the printout. Because the crop marks and page information are printed outside the page edges, it's necessary to choose Scale To Fit to fit everything onto an 8.5″ × 11″ piece of paper.

Selecting Use Document Bleed Settings causes InDesign to print objects that extend outside the edge of the page area. This option eliminates the need for entering the amount of extra area that should be imaged.



Note

You can have InDesign maintain the existing colors used in a job by choosing Composite Leave Unchanged in the Color section of the Print dialog box. Additionally, if you are a printer or service provider and need to print color separations from InDesign, choose Separations or In-RIP Separations based upon the workflow that you use. Also, certain printers, such as an RGB proofer, may not let you choose Composite CMYK.

6. On the left side of the Print dialog box, click the Output category. Choose Composite CMYK from the Color menu. (If you are printing to a black-and-white printer, choose Composite Gray.)

Tip

If your document contains transparency that is flattened during the printing process, select Simulate Overprint in the Output section of the Print dialog box when printing, for the best print result.

Choosing Composite CMYK causes any RGB colors, including those in RGB graphics, to be converted to CMYK at the time of printing. This setting changes neither the original, placed graphic files nor any colors applied to objects.

7. On the left side of the Print dialog box, click the Graphics category. Choose Optimized Subsampling from the Send Data menu.

When Optimized Subsampling is selected, InDesign sends only the image data necessary for the printer selected in the Print dialog box. This can reduce the time it takes to send the file to print.

To have the complete high-resolution graphic information sent to the printer, which may take longer to image, select All from the Send Data menu.

Tip

To quickly print using a preset, choose File > Print Presets and select the device preset. Holding down the Shift key while doing this will print without prompting you with the Print dialog box.

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8. Optionally, choose Subset from the Fonts Download menu. This causes only the fonts and characters that are actually used in the document to be sent to the output device and can reduce the time it takes to print single-page documents and short documents without much text.
9. On the left side of the Print dialog box, click the Advanced category and choose [Medium Resolution] from the Transparency Flattener Preset menu.

   The transparency flattener preset determines the print quality of objects affected by transparency. For example, imported graphics, as well as InDesign objects that include transparency effects, can cause elements below, such as strokes and text, to be outlined or create rasterized regions as part of the transparency process. You can choose the appropriate transparency flattener preset for your output needs. (The three default transparency flattener presets are explained in detail in a sidebar within the section called "Previewing how transparency effects will be flattened," earlier in this lesson.)

Note

The Optimized Subsampling option cannot be selected if you are using the Device Independent PPD, because this generic driver can't determine what information a specific printer chosen later may need.

Options for printing graphics

When you are exporting or printing documents that contain complex graphics (for example, high-resolution images, EPS graphics, PDF pages, or transparency effects), it will often be necessary to change resolution and rasterization settings to obtain the best output results.

Send Data—Controls how much image data in placed bitmap images to send to the printer or file.

All—Sends full-resolution data, which is appropriate for any high-resolution printing, or for printing grayscale or color images with high contrast, as in black-and-white text with one spot color. This option requires the most disk space.

Optimized Subsampling—Sends just enough image data to print the graphic at the best possible resolution for the output device. (A high-resolution printer will use more data than a low-resolution desktop model.) Select this option when you're working with high-resolution images but printing proofs to a desktop printer.

Note: InDesign does not subsample EPS or PDF graphics, even when Optimized Subsampling is selected.

Proxy—Sends screen-resolution versions (72 dpi) of placed bitmap images, thereby reducing printing time.

None—Temporarily removes all graphics when you print and replaces them with graphics frames with crossbars, thereby reducing printing time. The graphics frames are the same dimensions as the imported graphics and clipping paths are maintained, so you can still check sizes and positioning. Suppressing the printing of imported graphics is useful when you want to distribute text proofs to editors or proofreaders. Printing without graphics is also helpful when you're trying to isolate the cause of a printing problem.

—From InDesign Help

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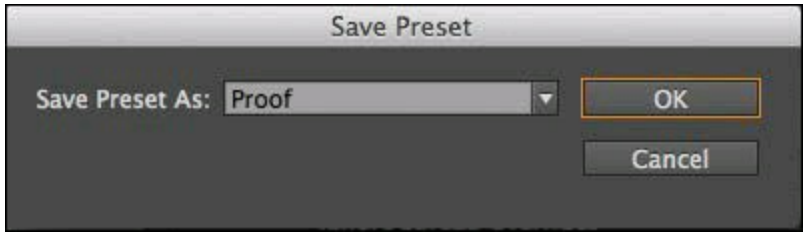
10. Click Save Preset at the bottom of the Print dialog box, name the preset **Proof**, and click OK.



Creating a print preset saves Print dialog box settings so you do not need to individually set every option each time you print to the same device. You can create multiple presets to meet various quality needs of individual printers you may use. When you want to use these settings in the future, you can choose them from the Print Preset menu at the top of the Print dialog box.

11. Click Print. If you are creating a PostScript file, click Save, browse to the Lesson13 folder, and save the file as **13_End.indd.ps**. The PostScript file could be provided to your service provider or commercial printer, or converted to an Adobe PDF file using Adobe Acrobat Distiller.

Options for downloading fonts to a printer

Printer-resident fonts—These fonts are stored in a printer's memory or on a hard drive connected to the printer. Type 1, TrueType, and OpenType fonts can be stored either on the printer or on your computer; bitmap fonts are stored only on your computer. InDesign downloads fonts as needed, provided they are installed on your computer's hard drive.

Choose from the following options in the Graphics area of the Print dialog box to control how fonts are downloaded to the printer.

None—Includes a reference to the font in the PostScript file, which tells the RIP or a post-processor where the font should be included. This option is appropriate if the fonts reside in the printer. TrueType fonts are named according to the PostScript name in the font; however, not all applications can interpret these names. To ensure that TrueType fonts are interpreted correctly, use one of the other font downloading options, such as Subset or Download PPD Fonts.

Complete—Downloads all fonts required for the document at the beginning of the print job. All glyphs and characters in the font are included even if they're not used in the document. InDesign automatically subsets fonts that contain more than the maximum number of glyphs (characters) specified in the Preferences dialog box.

Subset—Downloads only the characters (glyphs) used in the document. Glyphs are downloaded once per page. This option typically results in faster and smaller PostScript files when used with single-page documents or short documents without much text.

Download PPD Fonts—Downloads all fonts used in the document, even if those fonts reside in the printer. Use this option to ensure that InDesign uses the font outlines on your computer for printing common fonts, such as Helvetica and Times. Using this option can resolve problems with font versions, such as mismatched character sets between your computer and printer or outline variances in trapping. Unless you commonly use extended character sets, you don't need to use this option for desktop draft printing.

—From InDesign Help

Using the Ink Manager

The Ink Manager provides control over inks at output time. Changes you make using the Ink Manager affect the output, not how the colors are defined in the document.

The Ink Manager options are especially useful for print service providers when printing color separations for multicolor publications. For example, if a publication that will be printed with CMYK process inks uses a spot color, the Ink Manager provides the option to change the spot color to the equivalent CMYK process color. If a document contains two similar spot colors when only one is required, or if the same spot color has two different names, the Ink Manager lets you map the variations to a single spot color.

Next, you'll learn how to use the Ink Manager to convert a spot color to a CMYK color, and you'll create an ink alias so that the desired number of separations is created when the document is output as color separations.

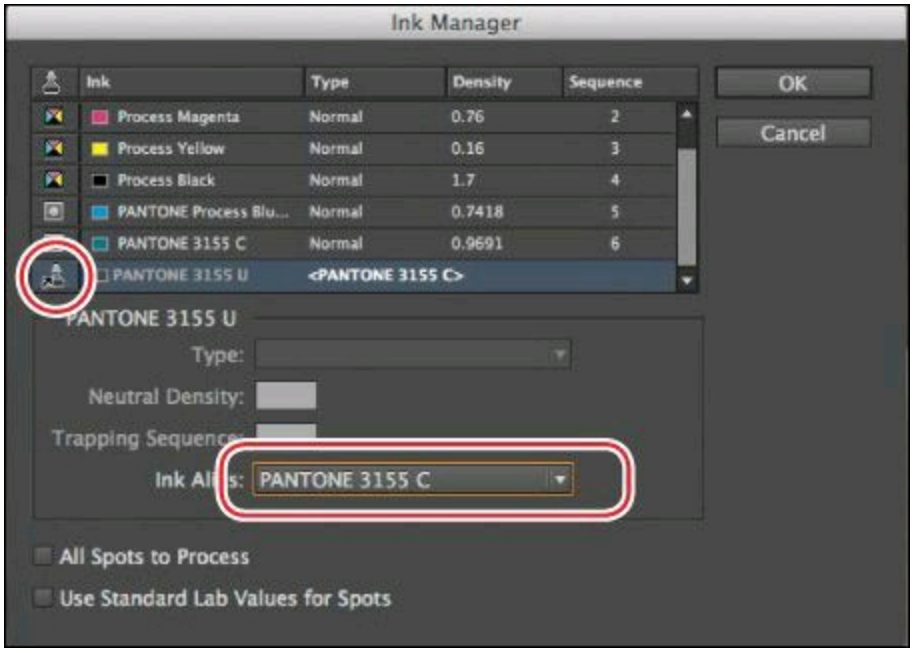
Note

You can also open the Ink Manager by choosing Ink Manager from the Separations Preview panel menu (Window > Output > Separations Preview).

1. Click the Swatches panel icon or choose Window > Color > Swatches to open the Swatches panel, and then choose Ink Manager from the Swatches panel menu.
2. In the Ink Manager dialog box, click the spot icon ( ) to the left of the Pantone 3155 C color swatch. It changes to a CMYK icon ( ). The color will now print as a combination of CMYK colors instead of printing on its own, separate color plate.

   This is a good solution if you want to to limit the printing to 4-color process without having to change this spot color in the source files of the imported graphics. The All Spots To Process option at the bottom of the dialog box lets you convert all spot colors to process.
3. Click the CMYK icon ( ) that now appears to the left of the Pantone 3155 C color swatch to convert it back to a spot color.
4. Click the Pantone 3155 U color swatch, and then choose Pantone 3155 C from the Ink Alias menu. (Scroll down if the name of the swatch is not visible in the list.) Now any page elements to which either of the two versions of Pantone 3155 is applied will print on the same

separation. (The sample document uses only Pantone 3155 C.) You don't need to do anything to Pantone Process Blue C. Because you relinked the two missing graphics earlier in this lesson, the document no longer contains any elements to which Pantone Process Blue C is applied.



5. Click OK to close the Ink Manager dialog box.
6. Choose File > Save to save your work, and then close the file.

Congratulations! You've completed this lesson.

Exploring on your own

1. Create new print presets by choosing File > Print Presets > Define. Define presets to use for oversized formats or for printing to various color or black-and-white output devices you may use.
2. Open the 13_Cover.indd file and explore how each color separation can be enabled or disabled using the Separations Preview panel. Choose Ink Limit from the View menu in the same panel. See how the total ink settings used in creating CMYK colors affect how various images print.
3. With the 13_Cover.indd file active, choose File > Print. Click the Output category on the left side of the Print dialog box, and examine the different options for printing color documents.
4. Choose Ink Manager from the Swatches panel menu and experiment with adding ink aliases for spot colors and converting spot colors to process.

Review questions

1. What problems does InDesign look for when using the [Basic] (Working) profile in the Preflight panel?
2. What elements does InDesign gather when it packages a file?
3. If you want to print the highest-quality version of a scanned image on a lower-resolution laser printer or proofer, what option can you select?
4. What functions does the Ink Manager provide?

Review answers

1. You can confirm that all items necessary for high-resolution printing are available by choosing Window > Output > Preflight. By default, the Preflight panel confirms that all fonts used in the document or inside placed graphics are available. InDesign also looks for linked graphic files and linked text files to confirm that they have not been modified since they were initially imported and also warns you of missing graphic files, unresolved caption variables, and overset text frames.
2. InDesign gathers a copy of the InDesign document along with copies of all the fonts and graphics used in the original document. The original files remain untouched. If you select Include IDML, InDesign creates an .idml version of the document that can be opened in previous versions of InDesign. If you select Include PDF(Print), InDesign creates an Adobe PDF (Print) version of the document. If you choose to include a PDF, you can also choose a PDF preset.
3. By default, InDesign sends only the image data necessary to an output device. If you want to send the entire set of image data, even if it may take longer to print, you can choose All from the Send Data menu in the Graphics area of the Print dialog box.
4. The Ink Manager provides control over inks at output time, including the ability to convert spot colors to process colors and to map individual ink colors to different colors.

14. Creating Adobe PDF Files with Form Fields

Lesson Overview

In this lesson, you'll learn to do the following:

- Add different types of PDF form fields to a page.
- Use prebuilt form fields.
- Add a description to a form field.
- Set the tab order of form fields.
- Add a Submit button to a form.
- Export and test an Adobe PDF (Interactive) file with form fields.

This lesson will take approximately 45 minutes.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the Getting Started section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.

Adobe InDesign CC provides all the tools you need to create simple PDF forms, and you have the option to use Adobe Acrobat to add features and functionality that aren't available in InDesign.

Getting started

In this lesson, you'll add several different types of form fields to a newsletter, export an Adobe PDF (Interactive) file, and then open the exported file and test the fields you created in InDesign.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

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1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.
2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced. To begin working, you'll open an InDesign document that is already partially completed.
3. Choose File > Open, and open the 14_Start.indd file, in the Lesson14 folder, located inside the Lessons folder within the InDesignCIB folder on your hard drive. This document includes the back page of a newsletter. (The other pages have been deleted to make navigation simpler.) (If the Adobe Typekit dialog box displays, click Sync Fonts.)
4. To see what the finished document looks like, open the 14_End.indd file, in the Lesson14 folder.
5. Close the 14_End.indd file after you have finished examining it, or you can leave this document open for reference.

Start file.

Completed document.

6. Choose File > Save As, rename the document **14_PDF_Form.indd**, and save it in the Lesson14 folder.

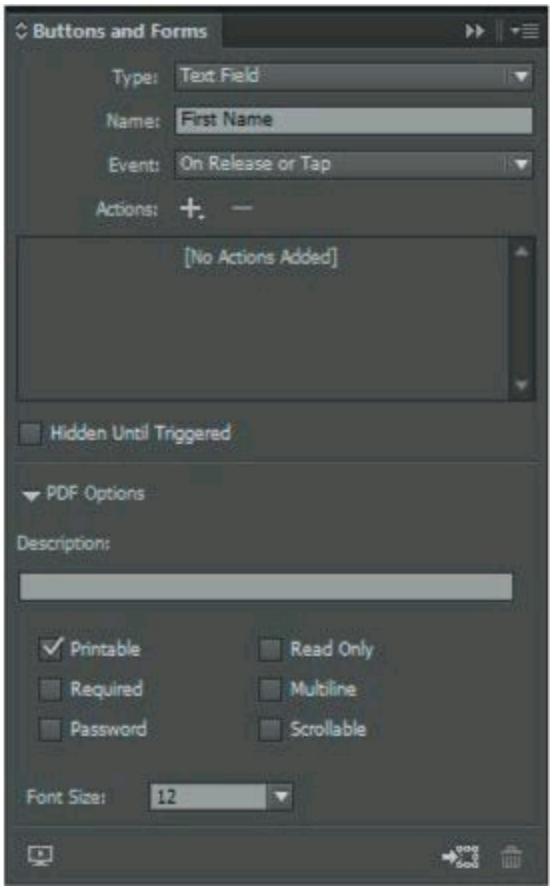
Adding form fields

Some setup work on the form fields has already been done. You'll complete the form by adding some more fields, and then modifying some of them.

Adding text fields

In a PDF form, a text field is a container into which the person who fills out the form can enter text. All but two of the text frames have already been converted into text fields. You'll convert these two text frames into text fields.

1. Choose Window > Workspace > Interactive For PDF. This optimizes the panel arrangement for the work you'll be doing in this lesson and provides quick access to many of the controls you'll use.
2. Use the Zoom tool ( ) to zoom in on the area in the top half of the page that contains the form objects. That's where all of your work in this lesson will be done.
3. Select the Selection tool ( ), and then move the pointer over the text field below "First Name." Notice that a blue dotted line is displayed around the object and a small graphic of a text field is displayed on the right side. The dotted line indicates that the object is a PDF form element; the icon of the text frame indicates that the element is a text field. Select the object.
4. Choose Window > Interactive > Buttons And Forms, or click the Buttons And Forms panel icon to display the Buttons And Forms panel. Notice the settings for the text field. Text Field is selected in the Type menu, and the name of the element is First Name.



Note

When adjusting the appearance of a combo box, list box, text field, or signature field, keep in mind that only a solid stroke and fill are retained when you export as Adobe PDF. These attributes are visible in an exported PDF file when Highlight Existing Fields is not selected in Adobe Reader or Adobe Acrobat when the form is opened.

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5. Select the text frame below "Last Name." In the Buttons And Forms panel, choose Text Field from the Type menu, and then assign a name to the field by entering **Last Name** in the Name

field. Press Enter or Return to apply the name change, and then deselect Scrollable.

6. Select the text frame under "E-mail Address." In the Buttons And Forms panel, configure it the same as you did the Last Name field and assign it the name **E-mail Address**.
7. Choose File > Save.

Adding radio buttons

Radio buttons present the person filling out the form with two or more choices, but only one of the choices can be selected at a time, unlike check boxes, which do allow multiple choices to be selected. Radio buttons are often simple circles; however, you can design your own, more elaborate buttons or choose from several sample buttons included with InDesign. In this lesson, you'll use one of the sample radio buttons.

1. Choose View > Fit Page In Window, and then zoom in to the "What's your connection with hockey?" portion of the form.
2. Choose Sample Buttons And Forms from the Buttons And Forms panel menu or click the Sample Buttons And Forms panel icon ( ) located to the left of the Pages panel icon to display the Sample Buttons And Forms panel. If necessary, reposition and resize the panel so that you can see the "What's your connection with hockey?" portion of the form.

Tip

When the Scrollable option is selected for a text field, more text can be entered in the field than is visible onscreen. This can result in only part of the text appearing on a printed copy of the page.

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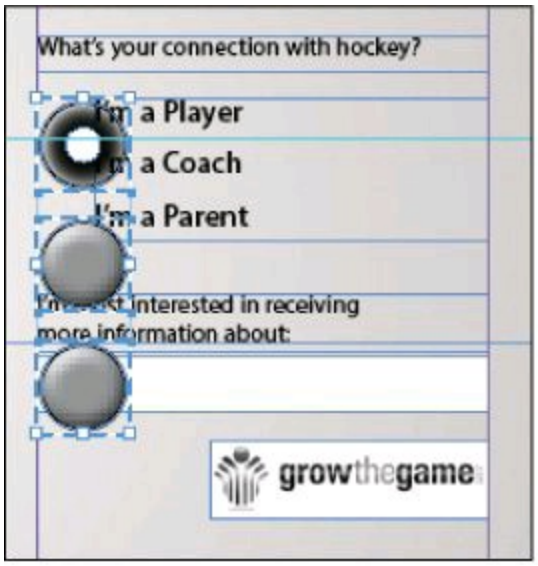
3. Drag the radio button named "019" in the Sample Buttons And Forms panel and position it below the text frame with the text "What's your connection with hockey?" Align the top of the topmost radio button with the top of the line of text to the right. Refer to the screen capture on the next page for the correct position.
4. In the Control panel, make sure that the upper-left reference point is selected in the reference point locator ( ), enter **40%** in the Scale X Percentage box, and then press Enter or Return.



Radio buttons before being scaled.

After being scaled 40%.

5. With all three buttons still selected, in the in the Buttons And Forms panel, enter **Hockey Connection** in the Name box, and then press Enter or Return.
6. Choose Edit > Deselect All or click an empty area of the page or pasteboard.

Tip

The "I'm a Player" button is selected by default when the exported PDF form is opened in Adobe Reader or Acrobat. If you uncheck Selected By Default in the Buttons And Forms panel for this element, nothing is selected by default in Reader.

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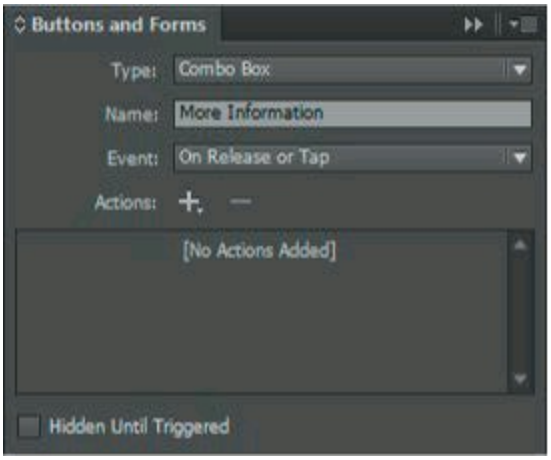
7. Use the Selection tool ( ) to select the first radio button (to the left of "I'm a Player").
8. In the Buttons And Forms panel, enter **Player** in the Button Value field at the bottom of the panel, and then press Enter or Return.
9. Repeat steps 7 and 8 to name the middle button Coach and the bottom button Parent.
10. Choose File > Save.

Adding a combo box

A combo box is a drop-down menu that lists multiple predefined choices. A viewer of the form can select only one of the choices. Next, you'll create a combo box that offers four choices.

1. Use the Selection tool ( ) to select the text frame below the heading "I'm most interested in receiving more information about:".
2. In the Buttons And Forms panel, choose Combo Box from the Type menu, and then enter **More Information** in the Name field.



Note

List boxes are similar to combo boxes in that you add list items; however, combo boxes allow you to select only one item from a list in the PDF form. If you select Multiple Selection for a list box, a viewer of the PDF can select more than one choice.

To provide the viewer of the PDF form with different choices, you'll add four list items.

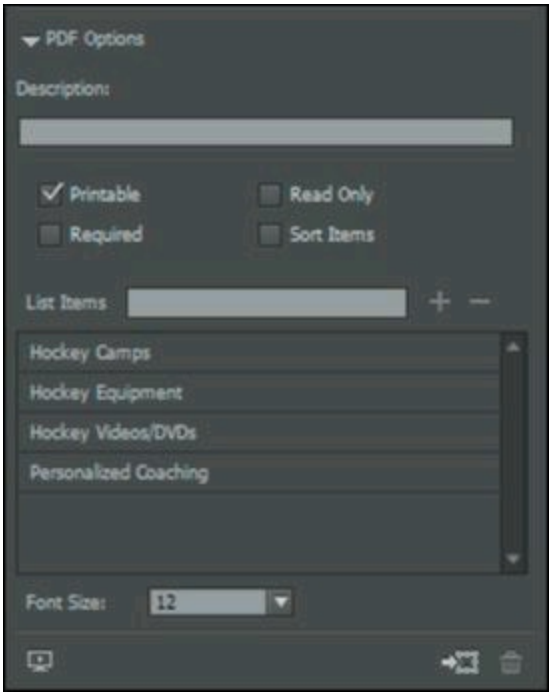
3. In the lower half of the Buttons And Forms panel, enter **Hockey Camps** in the List Items box, and then click the plus sign to the right of the box. Notice that the text you entered is now

displayed in the list below the box.

4. Repeat the previous step to add Hockey Equipment, Hockey Videos/DVDs, and Personalized Coaching to the list.

Tip

To sort list items alphabetically, select Sort Items in the Buttons And Forms panel. You can also modify the order of list items by dragging them up or down in the list.



5. Click Hockey Camps in the list of items to make it the default selection. When a viewer opens the exported PDF file, Hockey Camps will already be selected.

6. Choose File > Save.

Adding a description to a form field

You can provide additional guidance to viewers who fill out a form by adding descriptions to form fields. A description is displayed when the pointer rolls over a field that includes one. Next, you'll add a description to one of the text fields.

Tip

Adding descriptions to form fields is recommended, as it assists in making PDF forms accessible. For more information, go to http://www.adobe.com/accessibility.edu.html.

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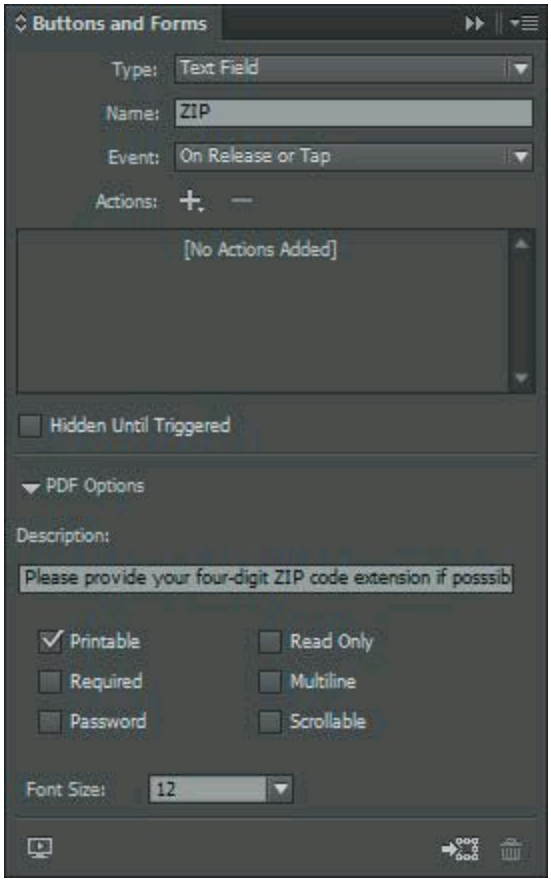
1. Use the Selection tool ( ) to select the text field below the text frame with the heading "ZIP."



2. In the Buttons And Forms panel, enter **Please provide your four-digit ZIP code extension if possible.** in the Description box, and then press Enter or Return.
3. Choose File > Save.

Setting the tab order of the fields

The tab order you establish for a PDF form determines the order in which fields are selected as a viewer of the form presses the Tab key. Next, you'll set the tab order for the fields on the page.

Tip

You can also change the tab order by dragging list items up or down in the Tab Order dialog box.

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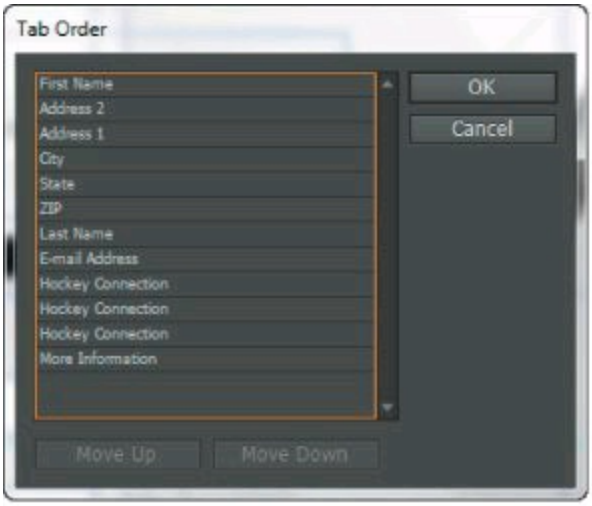
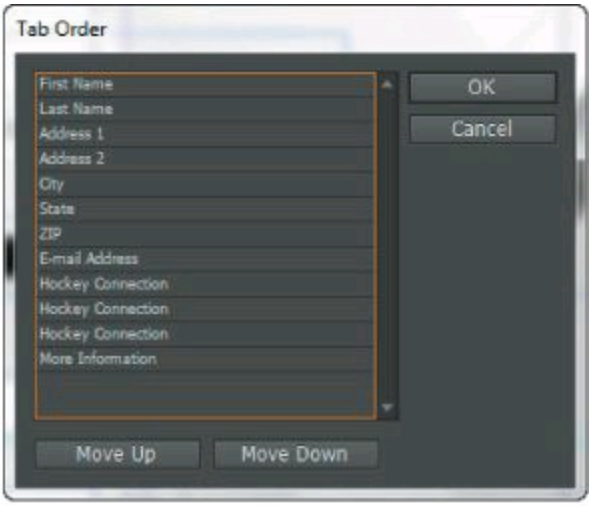
1. From the Object menu, choose Interactive > Set Tab Order.
2. In the Tab Order dialog box, click Last Name (the name of the text field you created that holds the family name of the person filling out the form), and then click Move Up until it appears below First Name near the top of the list. Use the Move Up and Move Down buttons or drag field names up or down to rearrange them so that they match the order on the page. Click OK to close the dialog box.



Tab order before being rearranged.



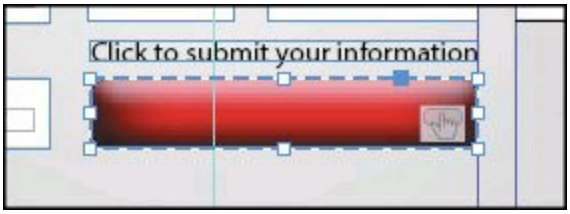
After being rearranged.

3. Choose File > Save.

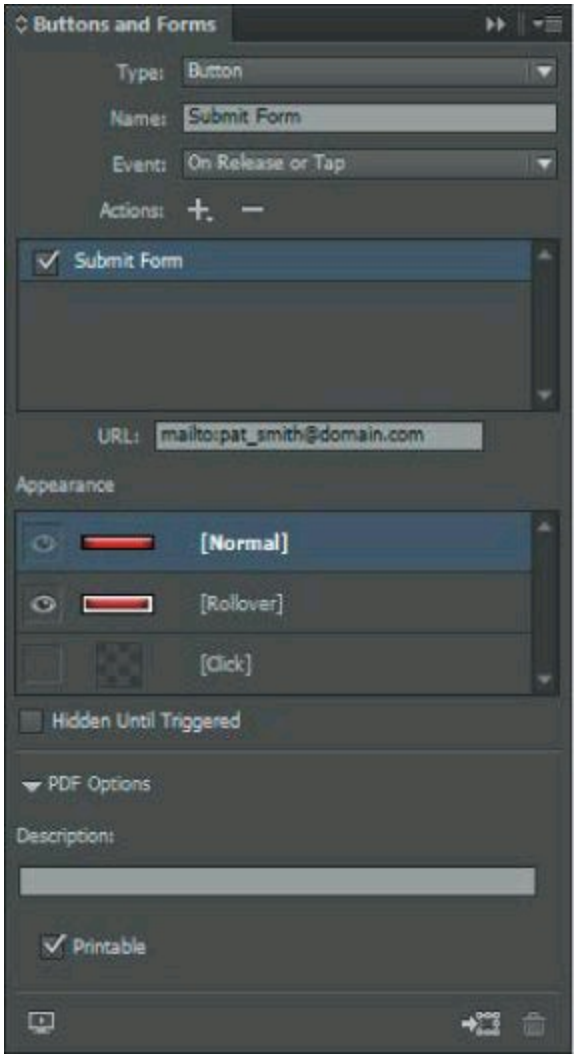
Adding a button to submit the form

If you distribute a PDF form, you're going to want to include a way for anybody who fills out the form to return it to you. To accomplish this, you'll create a button that sends the filled-out PDF form to your email address.

1. Drag the red button named "126" in the Sample Buttons And Forms panel and position it below "Click to submit your information." Align the left edge of the button with the left edge of the State field; align the bottom with the bottom of the E-mail Address field.
2. Use the Selection tool ( ) to widen the button by dragging the midpoint handle on its right edge so that the edge aligns with the column guide.
3. Shorten the button by dragging the midpoint handle on its top edge down until it's the same height as the E-mail Address field. A Smart Guide is displayed when the edges align and the heights are the same.



4. In the Buttons And Forms panel, enter **Submit Form** in the Name field, and then press Enter or Return.



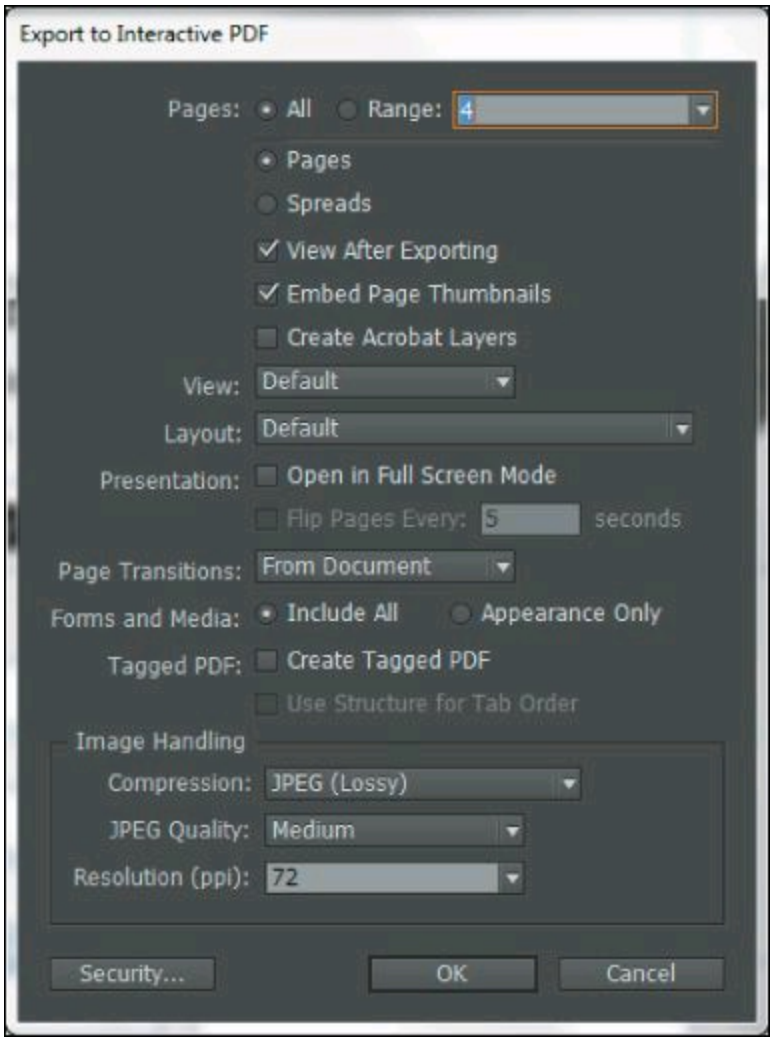
5. Make sure that Go To URL is selected below Actions, and then, click the Delete Selected Action button (−), and then click OK to confirm the deletion.
6. Click the Add New Action For Selected Event (+) button, and then choose Submit Form from the menu.
7. In the URL field, enter **mailto:**. Make sure you enter a colon after "mailto". Do not enter a space or a period before or after the colon.
8. Enter your email address after mailto: (for example, pat_smith@domain.com). This will return the completed form to you.
9. Press Enter or Return to apply the changes, and then choose File > Save.

Exporting an interactive Adobe PDF file

Now that you've finished work on the form fields, you're ready to export an interactive Adobe PDF file, and then test the exported file.

1. Choose File > Export.
2. In the Export dialog box, choose Adobe PDF (Interactive) from the Save As Type menu (Windows) or Format menu (Mac OS). Name the file **14_PDF_Form.pdf** and save it to the Lesson14 folder, located inside the Lessons folder within the InDesignCIB folder on your hard drive. Click Save.
3. In the Export To Interactive PDF dialog box, select Pages and make sure that Include All is selected for Forms And Media and that View After Exporting is selected. Leave all other

settings unchanged. Click OK.



If either Adobe Acrobat or Adobe Reader is installed on your computer, the exported PDF file will open automatically, and you can test the fields you created earlier. When you're done, click the button that emails the filled-out form to you. If you want, modify the settings in the Send Form dialog box and then click Continue to submit the form information, or click Cancel. Return to InDesign.

4. Choose File > Save.

Congratulations! You've created a PDF form.

Exploring on your own

Now that you've created a simple PDF form, you can explore a little further by creating other kinds of fields and by creating your own custom-designed buttons.

Tip

To enable the signature field for users of Adobe Reader, the PDF must be Reader Extended using Adobe Acrobat.

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1. Open a new document, create a text frame, and then use the Buttons And Forms panel to convert it to a signature field. A signature field in a PDF form lets the user apply a digital signature to the PDF file. Assign the field a name, and then export an Adobe PDF (Interactive) file. You can use Adobe Acrobat to test the signature field by clicking it and then following the onscreen

instructions.

2. Use the Ellipse tool ( ) to create a small circular frame. Use the Gradient panel to fill the circle with a radial gradient. If you want, use the Swatches panel to change the colors of the gradient. Use the Buttons And Forms panel to convert the frame into a button. Assign the button the Go To URL action and enter a complete URL in the URL field (for example, http://www.adobe.com). To test this button, export an Adobe PDF (Interactive) file and click the button.
3. Try one of the other prebuilt form fields in the Sample Buttons And Forms panel. Drag one onto the page, and then view its properties in the Buttons And Forms panel. You can use the element as is, or you can modify its appearance, change some of its properties, or both. Export and test the result.

Review questions

1. What panel lets you convert an object into a PDF form field and specify settings for form fields?
2. What action can you assign to a button that enables a viewer of the exported PDF form to send a copy of the filled-out form to an email address?
3. What programs can be used to open and fill out an Adobe PDF form?

Review answers

1. The Buttons And Forms panel (Window > Interactive > Buttons And Forms) lets you convert objects into PDF form fields and specify settings for them.
2. To enable the viewer of a PDF form to return a filled-out form, use the Buttons And Forms panel to assign the Submit Form action to the button. After you assign the Submit Form action, enter **mailto:** followed by an email address (for example, mailto:pat_smith@domain.com) in the URL field.
3. You can open and fill out PDF forms using Adobe Acrobat or Adobe Reader. Adobe Acrobat also offers additional features for working with PDF form fields.

15. Creating and Exporting an Ebook

Lesson Overview

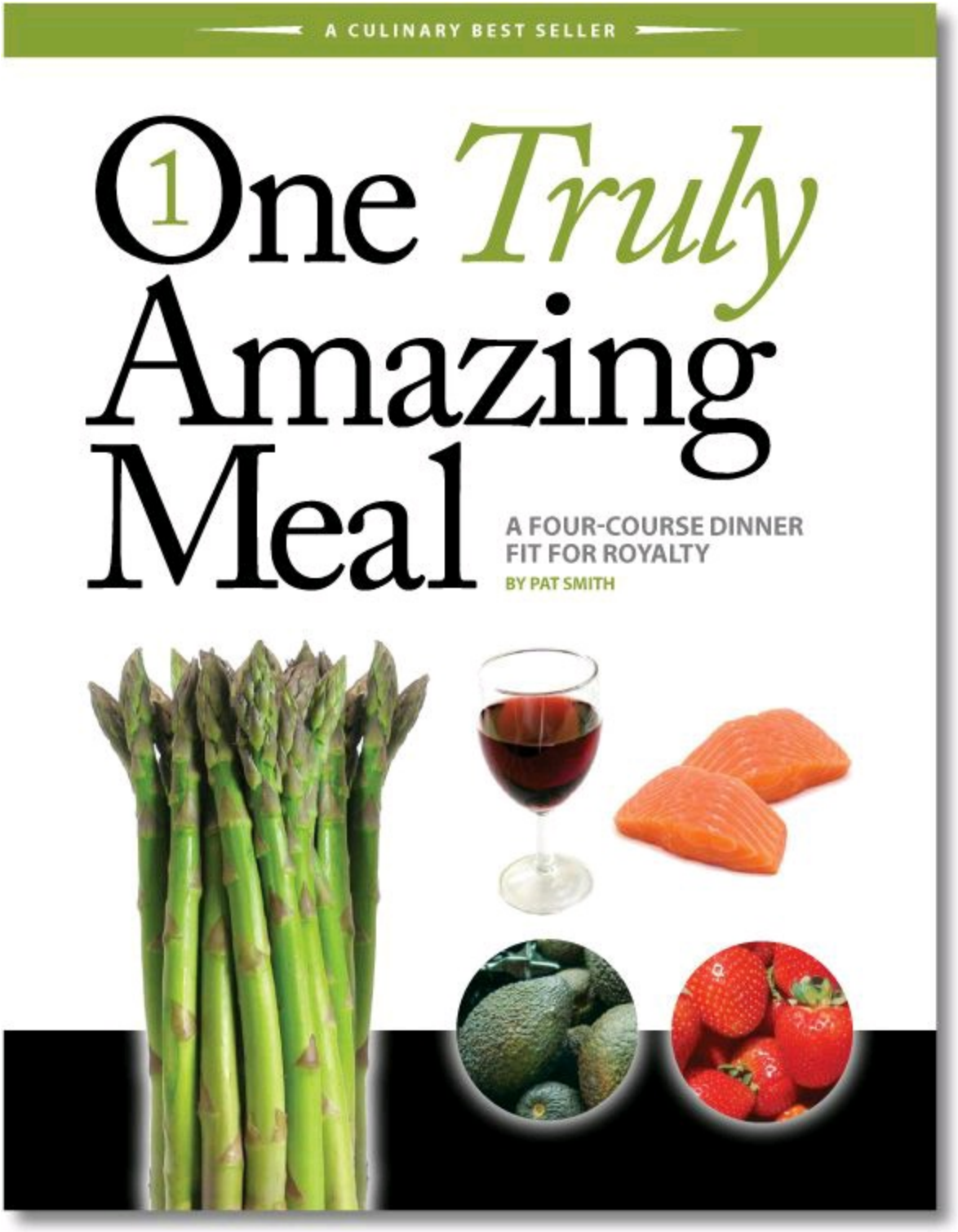
In this lesson, you will learn to do the following:

- Add anchored graphics to an InDesign layout that you will export as an EPUB file.
- Map paragraph and character styles to export tags.
- Create a table of contents for an EPUB file.
- Choose the content to include in an EPUB file and specify the order of the content.
- Add metadata information to an InDesign document and an EPUB file.
- Export and preview an EPUB file.

This lesson will take approximately 45 minutes.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the Getting Started section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.



Adobe InDesign CC (2014 Release) includes new and enhanced EPUB file export features that improve production and provide greater control for creating compelling ebooks that can be read on a wide range of electronic reading devices, tablets, and smartphones.

Getting started

In this lesson, you'll put the finishing touches on a booklet of recipes, export the document as an EPUB, and then preview the exported document.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning

of the book.

Because electronic publications are fundamentally different from print publications in several key ways, some basic information about EPUBs may help as you work through this lesson.

The EPUB standard was designed to allow publishers to create reflowable content that could be displayed on any electronic reading device and software—such as the Barnes & Noble Nook, Kobo eReader, Apple's iBooks for iOS (iPad, iPhone), Google Play Books app for Android (smartphones, tablets), and Adobe Digital Editions software—that supports the EPUB format. For reflowable EPUBs, the size of ereader screens varies from device to device, and content flows in a single, continuous thread.

Note

At the time of publication, Amazon Kindle does not support the EPUB standard, but converts submitted EPUB files to its own proprietary Kindle format.

In this lesson you will create a reflowable EPUB. Its content will be adjusted to fit the ereader's screen size; therefore, the page size of the InDesign document does not have to correspond to any particular device screen size and is set to a standard 8.5″ × 11″ page size.

1. To ensure that the preference and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.
2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced. To begin working, you'll open an InDesign document that is already partially completed.

Note

InDesign CC (2014 Release) offers two choices for EPUB export: EPUB (Reflowable) and EPUB (Fixed Layout). This lesson covers creation of a reflowable EPUB. For more information about EPUB (Fixed Layout) export, please refer to InDesign Help.

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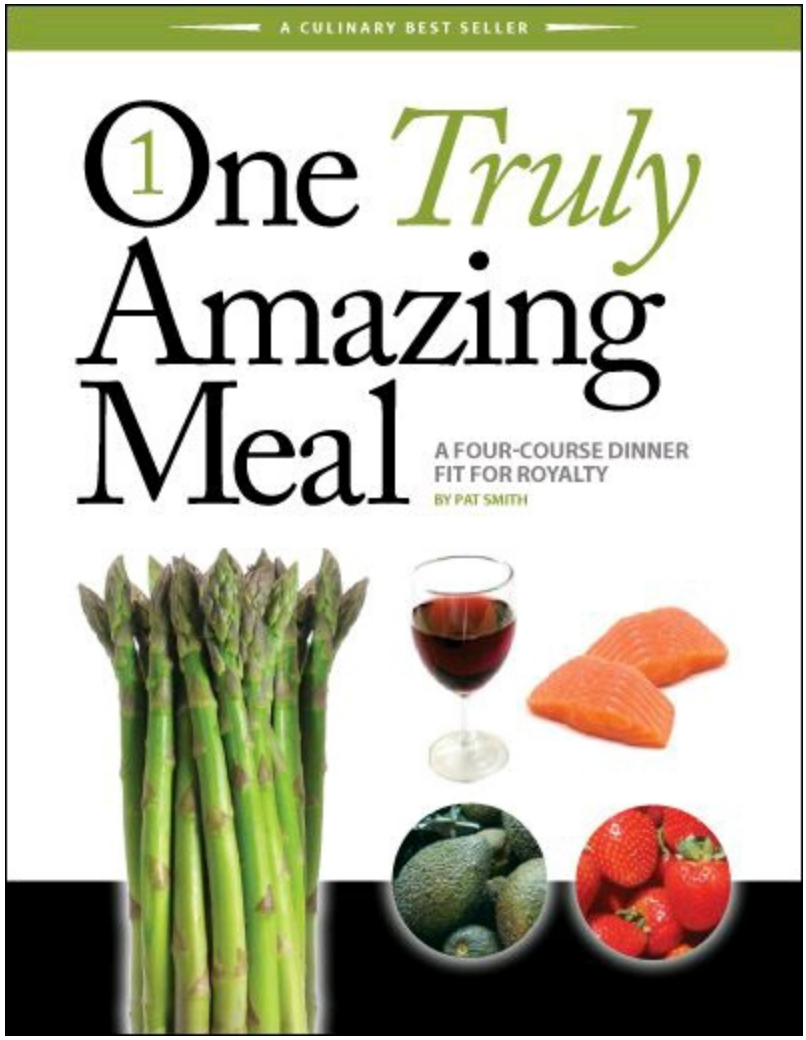
3. Choose File > Open, and open the 15_Start.indd file, in the Lesson15 folder, located inside the Lessons folder within the InDesignCIB folder on your hard drive. (If the Adobe Typekit dialog box displays, click Sync Fonts.)
4. To see what the finished document looks like, open the 15_End.indd file, in the Lesson15 folder.
5. Navigate through the pages of the finished document to view the title page and the four recipes that follow.



Tip

At the end of this lesson, you will export a reflowable EPUB file. You can use Adobe Digital Editions software for Windows or Mac OS to view and manage EPUBs and other digital publications. Adobe Digital Editions is available as a free download from the Adobe website (www.adobe.com).

6. Close the 15_End.indd file after you have finished examining it, or you can leave this document open for reference.
7. Return to the 15_Start.indd document, choose File > Save As, rename the document **15_RecipesBooklet.indd**, and save it in the Lesson15 folder.

Completing the booklet

Before the document is ready to be exported as a reflowable EPUB, a few finishing touches are required. You'll begin by adding some graphics, anchoring the graphics in text, and then formatting the paragraphs that contain the anchored graphics with a paragraph style that will automatically split the exported EPUB into multiple HTML files. To complete the booklet, you'll create a simple table of contents and add some metadata.

Adding anchored graphics

The recipe booklet includes four recipes: an appetizer, main course, vegetable dish, and dessert. The

recipes are contained in a single text thread. You will anchor a picture of each dish in front of its title, and then apply a paragraph style that will be used to create page breaks in the exported reflowable EPUB. To simplify this task, the graphic files are stored in a library.

Note

Anchoring graphics in text allows you to control their position relative to the text in the exported reflowable EPUB.

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1. Choose File > Open, and open the 15_Library.indl file in the Lesson15 folder.
2. Navigate to page 3 by using the Pages panel, or by pressing Ctrl+J (Windows) or Command+J (Mac OS), entering **3** in the Page box, and then clicking OK.

Tip

If you want, you can display hidden characters, such as paragraph returns and word spaces, for this lesson by choosing Type > Show Hidden Characters.

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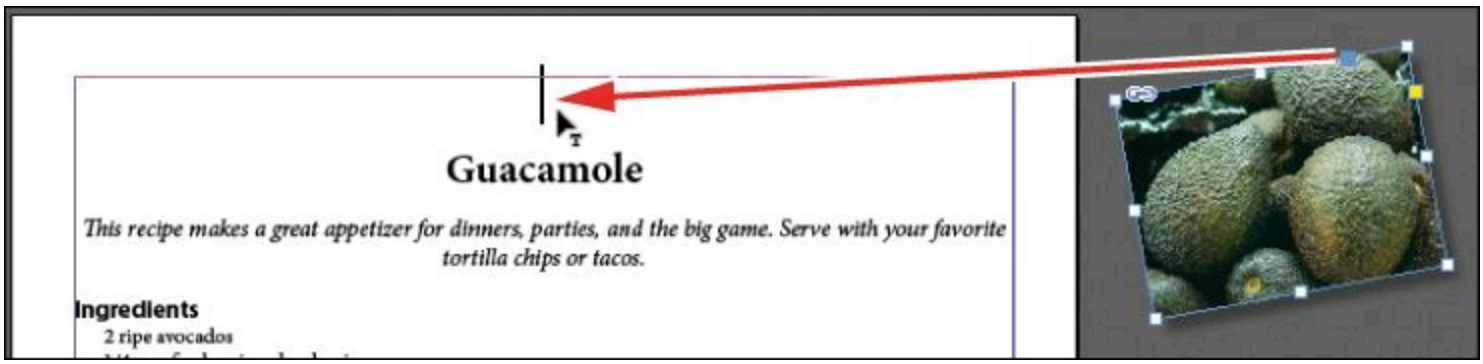
3. Using the Type tool ( ), place the insertion point before the headline "Guacamole," and then press Enter or Return.
4. Using the Selection tool ( ), drag the library item named "Avocados.tif" onto the pasteboard on either side of the page.
5. While pressing the Shift key, drag the blue square near the upper-right corner of the graphics frame to the empty line of text you created in step 3. Release the mouse button when a short vertical line is displayed above the headline. The graphics frame is now an inline anchored graphic and will flow with its surrounding text.

Tip

When inserting Library items as inline graphics, you can also establish the insertion point in the text, select the item in the Library, and then choose Place Item(s) from the Library panel menu. The item is automatically inserted as an inline graphic.



6. Using the Type tool, click to the left or right of the anchored graphic to establish the insertion point.
7. Choose Type > Paragraph Styles, or click Paragraph Styles in the list of docked panels to open the Paragraph Styles panel.

8. Click Graphics in the list of paragraph style names to assign this paragraph style to the one-line paragraph that contains the anchored graphic.

   When you export an EPUB file later in this lesson, you'll use the Graphics paragraph style to split the four recipes into four separate (HTML) files. Splitting a long document into smaller pieces makes display of the EPUB more efficient and causes each recipe to begin on a new page.

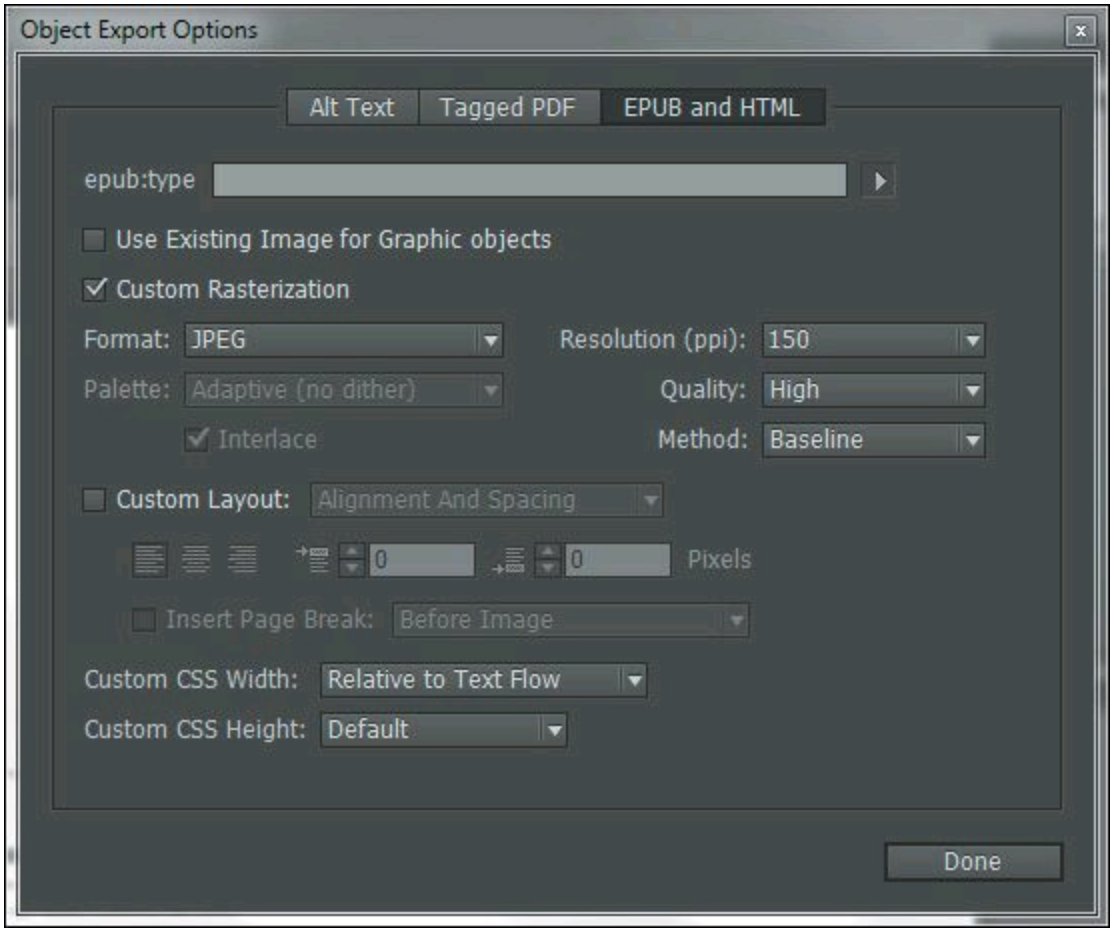
9. Repeat steps 3–8 to anchor the three remaining library items (Salmon.tif, Asparagus.tif, and Strawberries.tif) before the headlines of the three remaining recipes. Use the Pages panel to navigate from page to page as needed. Make sure that each graphics frame is anchored inline, and that the Graphics paragraph style is applied to the one-line paragraph that contains the frame.

10. Choose File > Save.

Customizing export options for anchored graphics

In addition to specifying global export options for objects, such as images, during EPUB export, you can specify export settings for individual objects before you export an EPUB. Next, you'll specify custom export settings for the four anchored graphics.

1. Navigate to page 3 and choose View > Fit Page In Window.
2. Use the Selection tool to select the graphics frame that contains the Avocados.tif image. (Make sure you don't click within the content grabber in the center of the frame or you'll select the graphic rather than the frame.)
3. Choose Object > Object Export Options.
4. In the Object Export Options dialog box, click the EPUB And HTML tab.
5. Select Custom Rasterization, choose 150 from the Resolution (ppi) menu, and choose Relative To Text Flow from the Custom CSS Width menu.

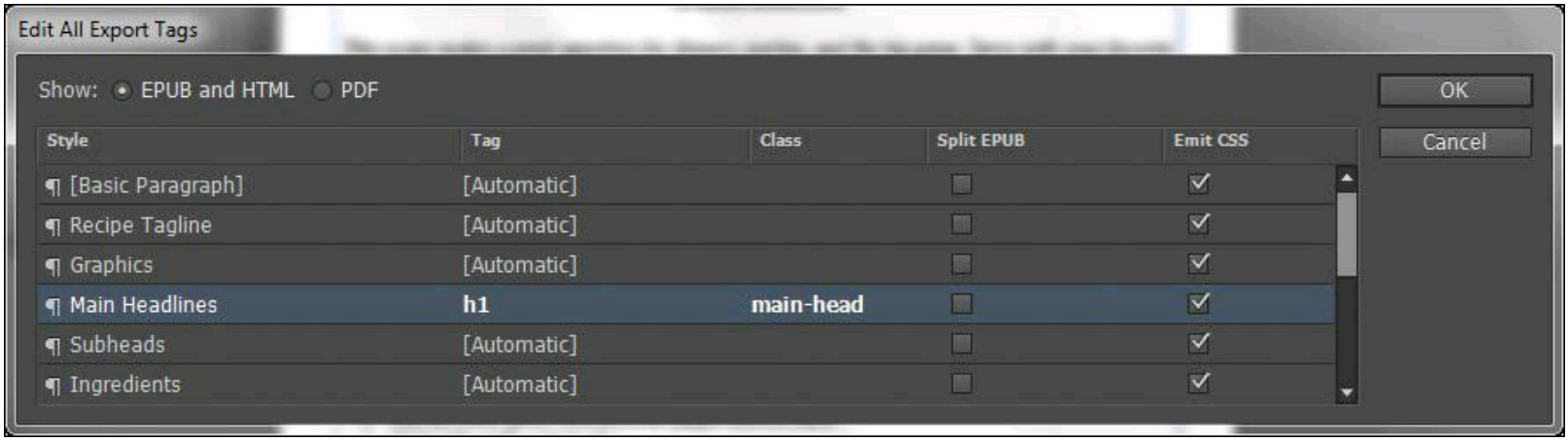


6. Leave the Object Export Options dialog box open and navigate to each of the three remaining inline graphics. Select each graphics frame and repeat step 5.
7. Click Done to close the dialog box.
8. Choose File > Save.

Mapping paragraph and character styles to export tags

EPUB is an HTML-based format. To help control the way the text in your EPUB file is formatted during export, you can map paragraph styles and character styles to HTML tags and classes. Next, you'll map several of the document's paragraph styles and character styles to HTML tags.

1. If the Paragraph Styles panel is not open, choose Type > Paragraph Styles, or click the Paragraph Styles tab in the stack of docked panels.
2. Choose Edit All Export Tags from the Paragraph Styles panel menu.
3. Make sure that Show EPUB And HTML is selected in the Edit All Export Tags dialog box, and then click [Automatic] to the right of the Main Headlines style. From the accompanying menu, choose h1. In the Class field for Main Headlines enter **main-head**. When you export as EPUB, this assigns the h1 HTML tag (used for the largest headlines) and the "main-head" class to paragraphs to which the Main Headlines paragraph style is applied.



4. Apply tags and class names to the remaining paragraph styles, as shown below. If you want, enlarge the dialog box by dragging its lower-left corner, bottom edge, or lower-right corner.
   - Recipe Tagline: h3; Class: **tagline**
   - Graphics: Automatic
   - Subheads: h2; Class: **subheads**
   - Ingredients: p
   - Instructions: Automatic; Class: **instructions**
   - Instructions Contd.: Automatic; Class: **instructions**
   - Related Recipes: Automatic

Tip

The Emit CSS option controls which paragraph style is used to define the CSS class when you export an EPUB. The ability to enable or disable this option is especially helpful when you map several styles to the same class. To avoid CSS class definition conflicts, you can choose to emit the CSS information for only one of the styles. The CSS class will then be defined based on the style for which Emit CSS has been selected.

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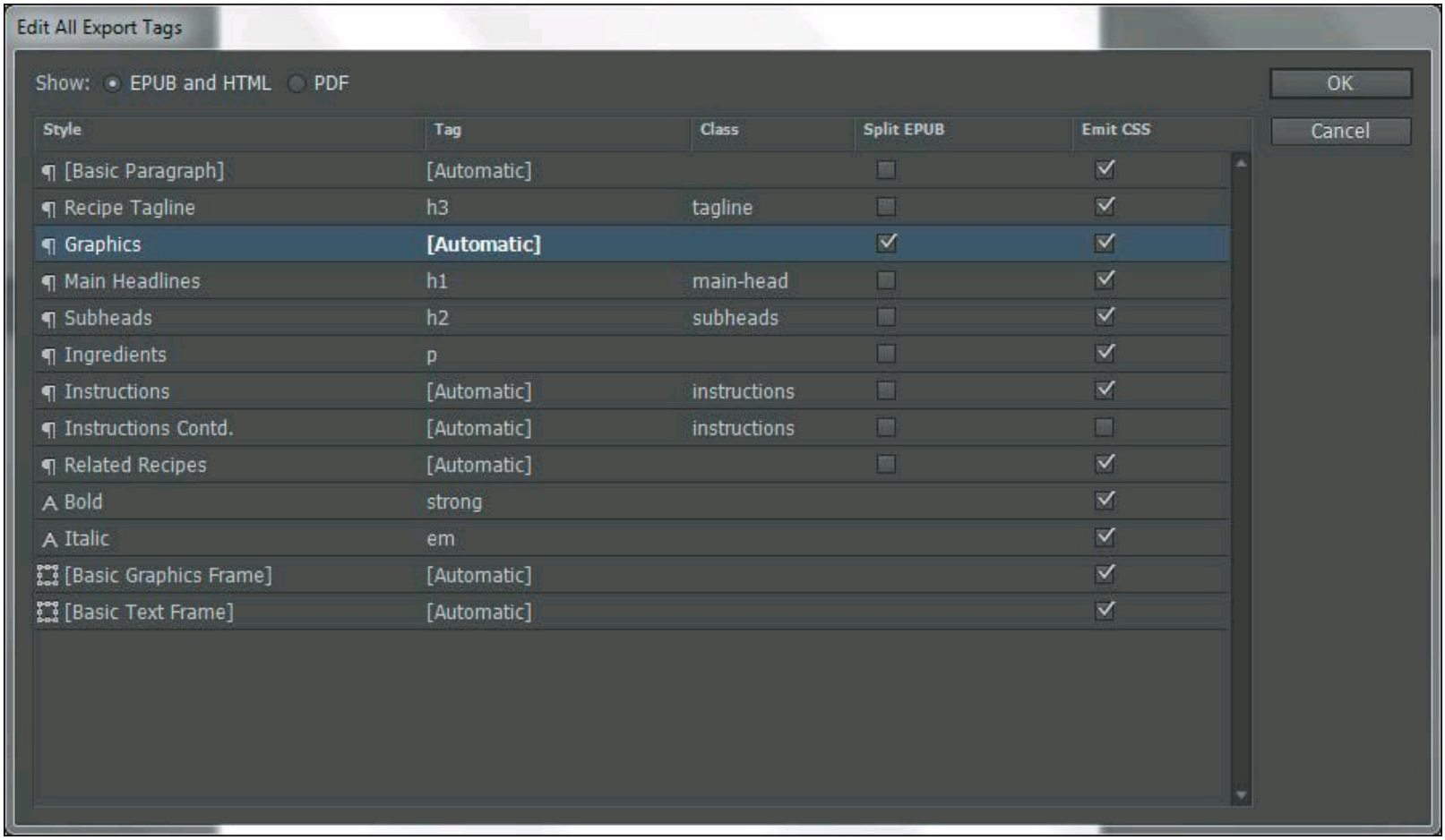
5. Because the Instructions and Instructions Contd paragraph styles are mapped to the same tag and class name, you'll export the CSS only for the Instructions paragraph style when you export an EPUB later in this lesson. Deselect Emit CSS for the Instructions Contd. paragraph style.

   The document also includes two character styles, listed below the paragraph styles, to which you need to assign tags.

6. Apply the strong tag to the Bold character style and the em tag to the Italic style. The strong tag will maintain the bold text in the recipes, and the em (emphasis) tag will maintain the italics in the taglines below the recipe titles.

   Before you close the Edit All Export Tags dialog box, you'll take care of one more task: You'll specify that the Graphics paragraph style break the EPUB into smaller HTML documents. Each recipe will produce a new HTML file in the EPUB, and as a result, each recipe will start on a new page with a picture of the dish.

7. Select the Graphics paragraph style, and then select its Split EPUB check box.



Note

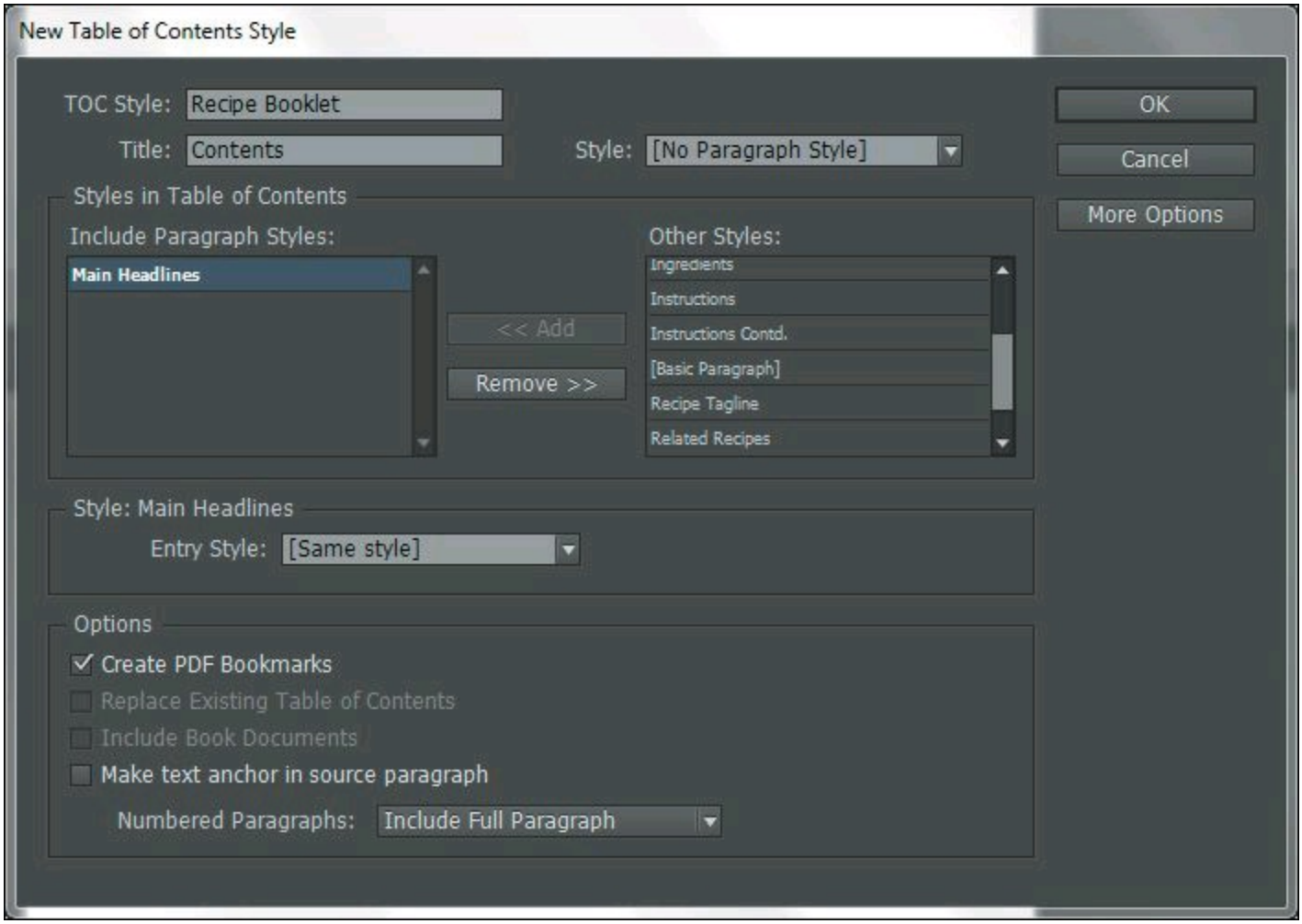
The Edit All Export Tags dialog box displays a list of all paragraph, character, and object styles used in a document and lets you set the Tag and Class for all styles. You can also set export tagging when you create and edit individual paragraph, character, and object styles.

8. Click OK to close the dialog box.
9. Choose File > Save.

Adding a table of contents

When you export an InDesign document as an EPUB, you have the option to generate a table of contents that enables a viewer to navigate easily to certain locations in the EPUB. This table of contents is based on a table of contents you will now create.

1. Choose Layout > Table Of Contents Styles.
2. In the Table Of Contents Styles dialog box, click New to display the New Table Of Contents Style dialog box.
3. In the New Table Of Contents Style dialog box, enter **Recipe Booklet** in the TOC Style box. Use the scroll bar to display and select the Main Headlines paragraph style in the Other Styles list, and then click the Add button to move this paragraph style to the Include Paragraph Styles list. Leave all other settings unchanged, and click OK to close this dialog box; then click OK again to close the Table Of Contents Styles dialog box.



4. Choose File > Save.

Choosing the content of an ebook

The Articles panel provides an easy way to choose the content (text frames, graphics frames, unassigned frames, and so on) that you want to include in a reflowable EPUB and specify the order in which objects are exported. Next, you'll add three articles to the Articles panel, name them, and rearrange the order of two of the elements.

Adding the cover page

You will use the first page of the document as an inline cover image in the exported EPUB. Because the first page contains several objects, and you want to maintain the appearance of the page, you need to export the content for the cover page as a single graphic rather than as a succession of individual objects. To accomplish this, you'll group all of the objects on page 1, and then specify export options that will convert the group into a single graphic when exported.

1. Navigate to page 1 of the document and choose View > Fit Page In Window.

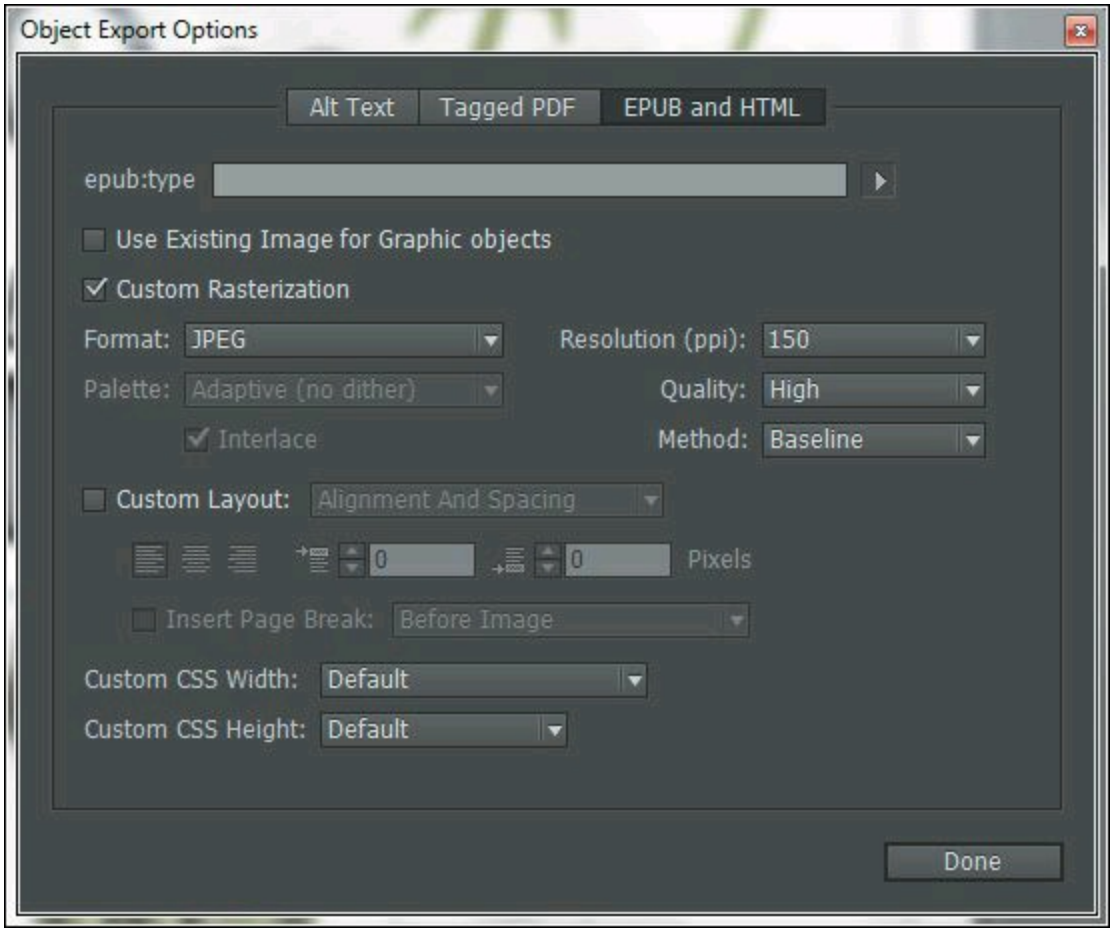
Tip

To prevent any cover-page objects that are within the bleed area from being included in the rasterized cover image, remove the bleed from any objects extending past the page edge.

---

2. Choose Window > Articles to open the Articles panel.

3. If necessary, select the Selection tool ( ), choose Edit > Select All, and then choose Object > Group.
4. Choose Object > Object Export Options to open the Object Export Options dialog box.
5. In the EPUB And HTML section, select Custom Rasterization, and choose 150 from the Resolution (ppi) menu. Click Done to close the dialog box.



6. Drag the group of objects on page 1 into the Articles panel. In the New Article dialog box, enter **Cover Page** in the Name box, make sure Include When Exporting is selected, and then click OK.

Notice that the Cover Page article has been added to the Articles panel.

7. Choose File > Save.

Adding the title page and reordering its content

Page 2 of the document is a simple title page with only a few objects. Because this page is not design-intensive, there's no need to convert it into a graphic as you did with the first page. So instead of grouping the objects before you create a new article and then specifying custom export settings, you'll

simply drag them all into the Articles panel. Then, you'll modify the article by reordering two of its elements.

1. Navigate to page 2 of the document.

Tip

You can also add a new article by choosing New Article from the Articles panel menu or by clicking the Create New Article button ( ) at the bottom of the panel.

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2. Use the Selection tool ( ) or choose Edit > Select All to select all objects on the page, drag the objects into the Articles panel below the Cover Page article, and name the article **Title Page**. Click OK to close the New Article dialog box.

Tip

When you Shift-click to select multiple objects on a page and then create an article, the content order in the Articles panel reflects the order in which you selected the objects.

The order of the objects in the Title Page article is based on the order in which the objects were created. If you were to export the document at this point, the two horizontal lines would be the last two objects on the page because they were created last. Because this page will not be converted into a graphic when exported, you need to change the order of the elements in this article to ensure that they're in the correct order when exported.

3. In the Articles panel, drag the topmost of the two <line> elements in the list upward. When a white horizontal line is displayed above "Everything you need ...," release the mouse button. This results in a horizontal line above and below the text frame that contains "Everything you need ..." (to match the InDesign page).
4. Drag the Strawberries.tif element to the bottom of the list to place it below all of the other elements in the article. This will move the graphic to the bottom of the title page in the EPUB, which means that the layout of this page in the EPUB will be slightly different from the layout in the InDesign document.
5. Choose File > Save.

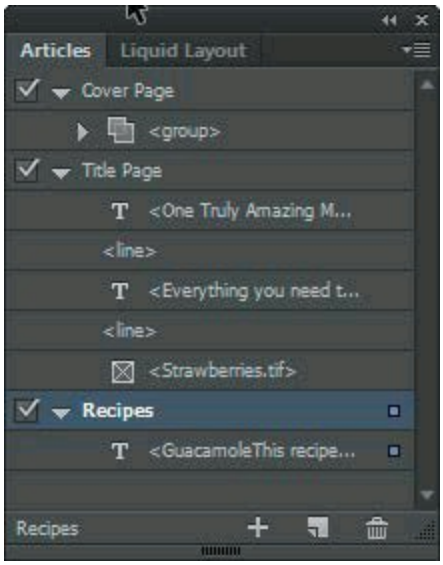
Adding the remaining content

The remainder of the booklet—the four recipes—is contained in a single text thread. Next, you'll create one more article that contains the recipes, but first, it's worth taking a quick look at the text.

If you click within the text of the recipes, you'll notice that all of the text has been formatted with paragraph styles. This helps ensure that the text retains its styling when the document is exported. The bulleted and numbered lists have been styled using paragraph styles that include automatic bullets and numbers.

1. Navigate to page 3. Use the Selection tool ( ) to drag the text frame containing the recipes into the Articles panel below the Title Page article, and name it **Recipes**. (If necessary, lengthen the panel by dragging the bottom edge.)
2. Click OK to close the New Article dialog box.

Notice that the Recipes article contains only one element: a text frame. The graphics that you anchored earlier are not listed separately, because they're part of the recipe text.

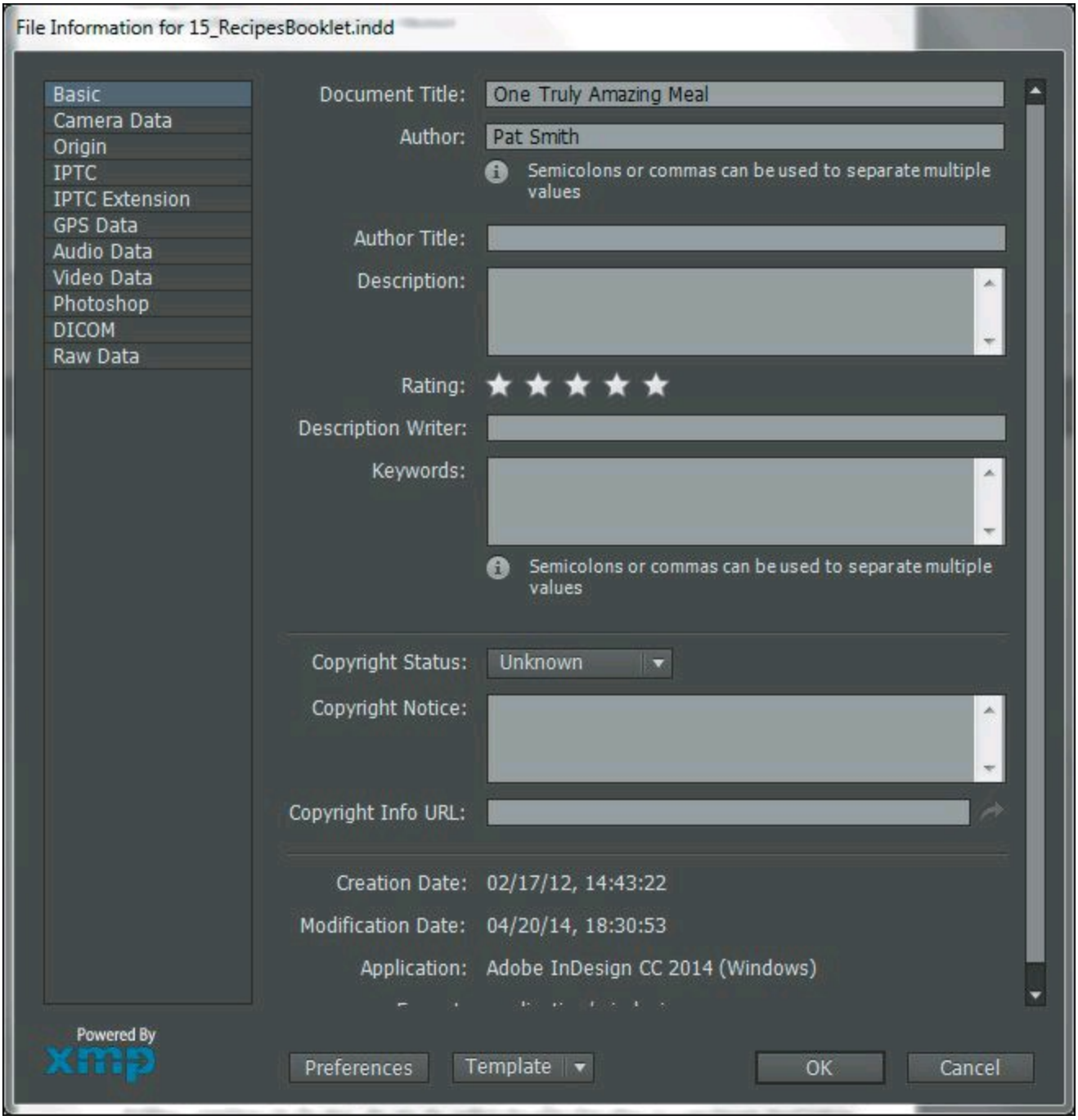


3. Choose File > Save.

Adding metadata

Metadata is a set of standardized information about a file, such as the title, the name of the author, a description, and keywords. When exporting an EPUB file, you can automatically include such metadata in the EPUB file. This data is used, for example, to display a document's title and author in the EPUB library on ereaders and to find your EPUB within a large collection of EPUBs. Next, you'll add this metadata information to the InDesign document. This information is included in the exported EPUB and is displayed when the EPUB is opened.

1. Choose File > File Info.
2. In the File Information dialog box, make sure Basic is selected in the list on the left, and then enter **One Truly Amazing Meal** in the Document Title box and your name in the Author box. Click OK to close the dialog box.



3. Choose File > Save.

Exporting an EPUB file

Now that you've completed the preparatory work, the document is ready to be exported as a reflowable EPUB file. To complete this lesson, you'll specify several custom export options to take advantage of the work you did earlier in this lesson when you optimized the document for EPUB export.

Specifying export settings

Much as the settings in the Print dialog box control the appearance of printed pages, the settings you make when you export an InDesign document as an EPUB control the appearance of the EPUB. You'll specify several general settings and then a few advanced settings.

1. Choose File > Export.
2. In the Export dialog box, choose EPUB (Reflowable) from the Save As Type menu (Windows)

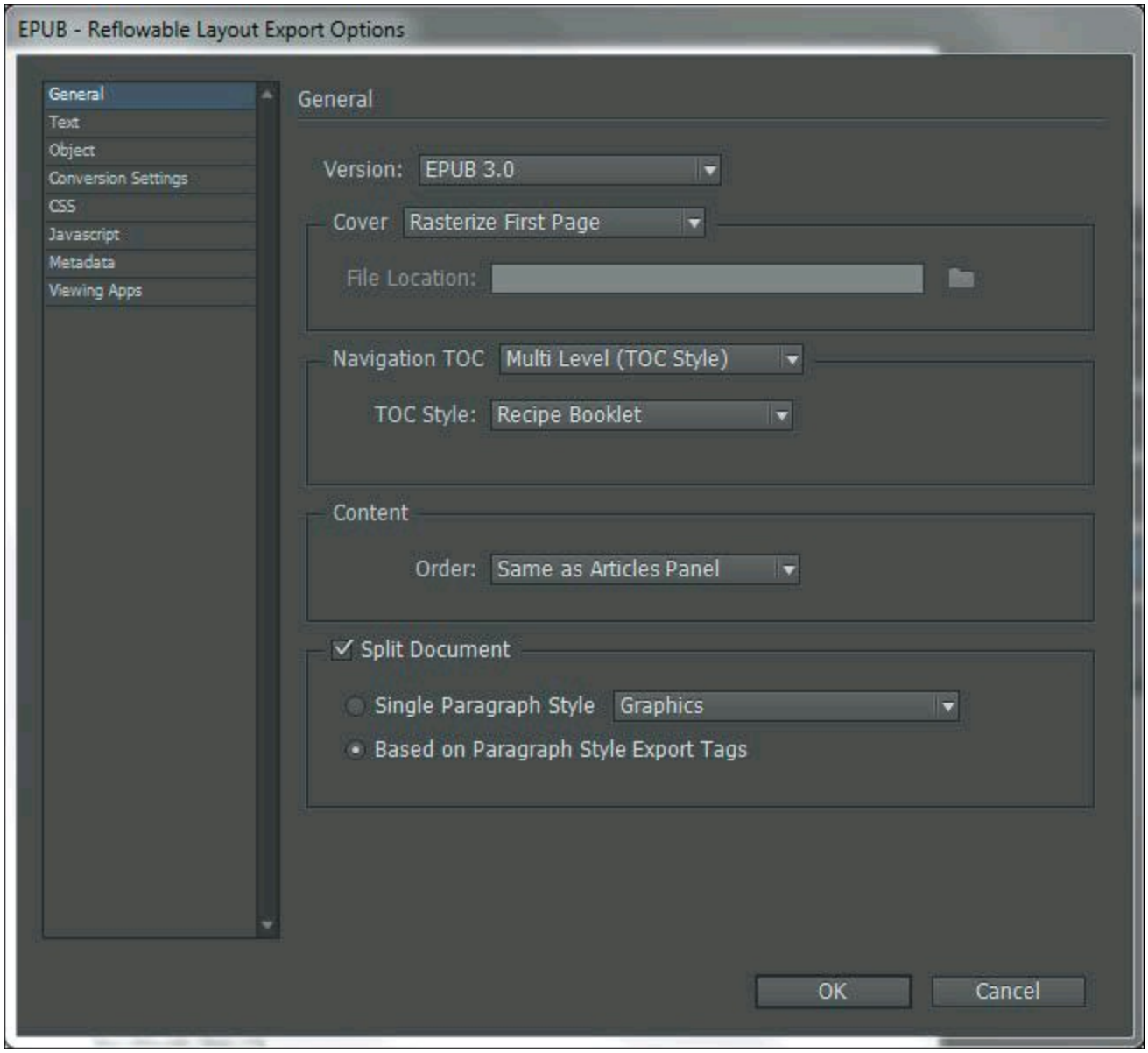
or the Format menu (Mac OS).

3. In the File Name box (Windows) or the Save As box (Mac OS), name the file **15_Recipes.epub** and save the file in the Lesson15 folder, located inside the Lessons folder within the InDesignCIB folder on your hard drive.
4. Click Save to close the Export dialog box.
5. In the General section of the EPUB - Reflowable Layout Export Options dialog box, choose EPUB 3.0 from the Version menu, and then specify the following Setup options:
   - Cover: Rasterize First Page
   - Navigation TOC: Multi Level (TOC Style)
   - TOC Style: Recipe Booklet
   - Content Order: Same As Articles Panel

   Make sure that Split Document and Based On Paragraph Style Export Tags are selected. Because you specified that the Graphics paragraph style create smaller HTML sections in the EPUB when you assigned tags to paragraph styles earlier in this lesson, choosing Based On Paragraph Style Export Tags will start a new HTML section in the EPUB at each of the four graphics you anchored within the recipes.

Note

Using the Based On Paragraph Style Export Tags setting lets you divide a long document into smaller documents when you enable the Split EPUB feature for a particular paragraph style. You can also select a paragraph style in the EPUB - Reflowable Layout Export Options dialog box that triggers these breaks.



6. Click Text in the list in the upper-left corner of the EPUB - Reflowable Layout Export Options dialog box. For Lists, make sure Map To Unordered Lists is selected from the Bullets menu and Map To Ordered Lists is selected from the Numbers menu. This ensures that the numbered and bulleted lists in the recipe text are converted to HTML lists in the EPUB.
7. Click Object in the list in the upper-left corner of the EPUB - Reflowable Layout Export Options dialog box. Make sure Preserve Appearance From Layout is selected to ensure that image cropping is retained for graphics that are not inline and also to preserve attributes such as rotation and transparency effects.

Tip

The Ignore Object Export Settings check box in the Object section of the EPUB - Reflowable Layout Export Options dialog box lets you override any export settings you've applied to individual objects and groups.

Choose Relative To Text Flow from the CSS Size menu to prevent objects from being larger than preferred.

8. In the Conversion Settings section, choose JPEG from the Format menu, and make sure 150 is selected for Resolution PPI.

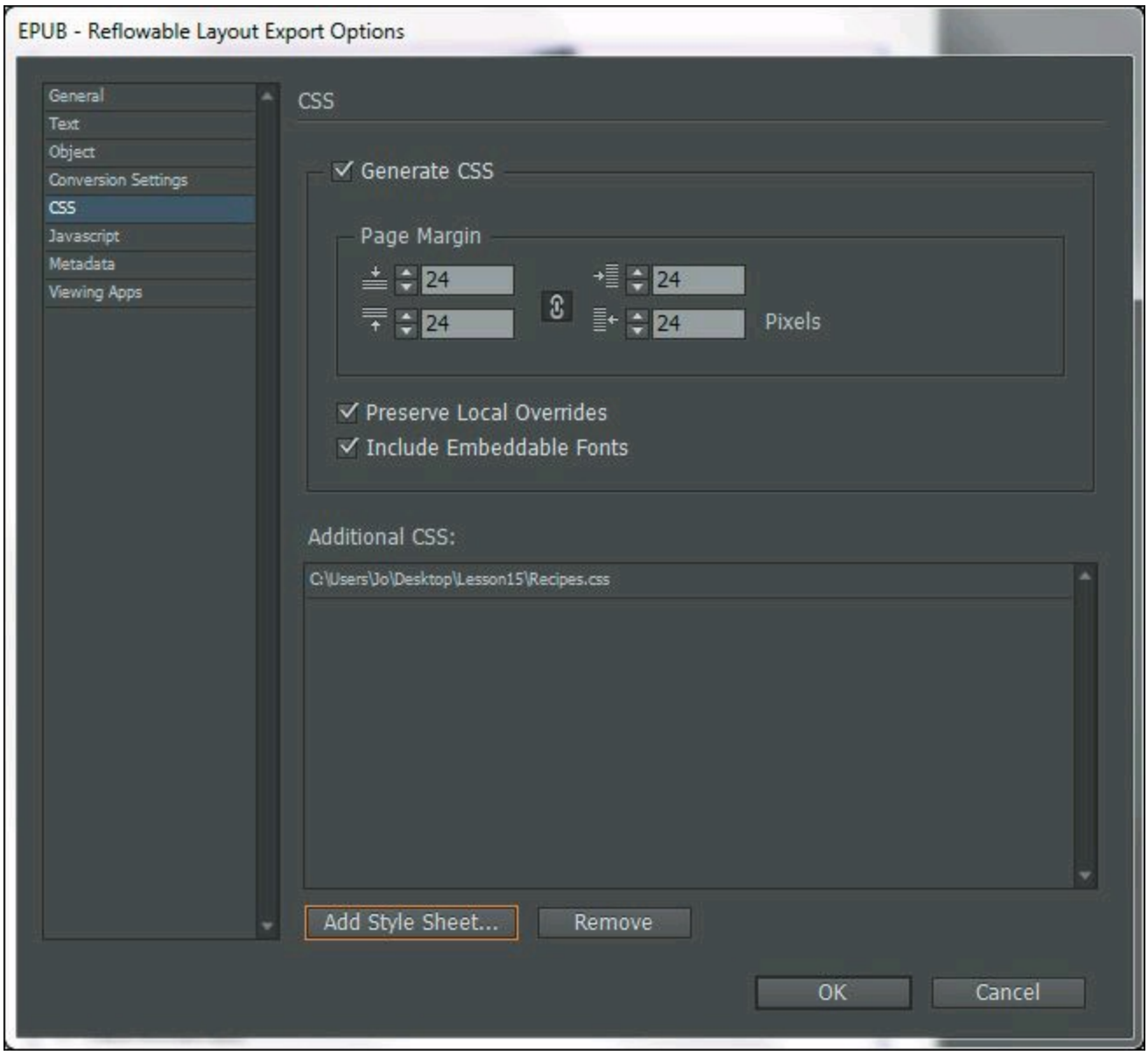
9. In the CSS section, specify 24 for Page Margin (all sides) and make sure that Generate CSS, Preserve Local Overrides, and Include Embeddable Fonts are selected. Click Add Style Sheet.

10. Select the Recipes.css file, in the Lesson15 folder, and then click Open.

This CSS style sheet contains a small piece of HTML code that changes the color of the recipe names and the subheads.

Note

If you've applied numerous manual overrides to paragraphs and characters formatted with styles, selecting Preserve Local Overrides can add significant overhead to the HTML and CSS that InDesign generates when you export an EPUB. If you don't select this option, you'll likely need to edit the CSS to further control the appearance of your EPUB. Editing CSS falls outside the scope of this book.



11. In the Metadata section, notice that the metadata information you entered earlier in this lesson is displayed. If you want, add additional information in the other fields.

12. In the Viewing Apps section, select Adobe Digital Editions if it's listed. If you've installed Adobe Digital Editions and it's not listed as an application, click Add Application and select it

from the Program folder (Windows) or Applications folder (Mac OS) on your computer. Alternatively, select another program that reads EPUBs. When the EPUB is exported it is automatically opened in the selected program. The Adobe Digital Editions software is available as a free download from the Adobe website: www.adobe.com.

13. Click OK to export a reflowable EPUB. If an alert is displayed warning that certain objects might not appear as expected after export, click OK to continue and view the EPUB.

Note

InDesign automatically generates a Unique ID for an EPUB; however, for commercial EPUBs you would enter the ISBN.

If Adobe Digital Editions is installed on your computer, the EPUB file will open automatically and you can scroll through it to view the content. You can also open the EPUB file on any device that supports the EPUB format.

14. Return to InDesign.
15. Choose File > Save.

Congratulations! You've created an electronic publication that can be viewed on a wide variety of electronic reading devices.

Note

Not all ereaders support font embedding. If possible, test your EPUB on various devices to ensure that you're satisfied with the output. To further control how the HTML tags and classes are displayed on ereaders, you can edit the CSS file.

Exploring on your own

Now that you've created an EPUB, choose File > Save As, and save the completed InDesign document as **15_Practice.indd**. You can use this practice document to perform any of the tasks from the lesson using different settings.

1. Revisit the Edit All Export Tags dialog box (Paragraph Styles panel menu > Edit All Export Tags) and try mapping some of the paragraph styles to different HTML tags. Export your new version and compare the changes to the text in the original EPUB you exported.

Tip

An alternate technique for splitting a long document into smaller HTML documents is to create individual InDesign documents for each section of an EPUB, combine these into an InDesign book, and then choose Export Book To EPUB from the Book panel menu to generate the EPUB.

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2. Export another reflowable EPUB, but instead of using the Articles panel to specify the content and order of an EPUB, this time choose Based On Page Layout from the Content Order menu in the General section of the EPUB - Reflowable Layout Export Options dialog box. Compare this

version with the original.

Note

Several editors that can open .epub files for further editing are available. Examples of such editors are <oXygen/> XML Editor and Bare Bones Software's TextWrangler.

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3. If you're the adventurous type, you can "open" an EPUB file and then view its component files. An EPUB file is essentially a compressed file that contains several folders and files. If you replace the .epub extension of an EPUB file with .zip, you can then decompress the file using a file-decompression utility. You'll find folders that contain the images in the InDesign document, as well as the fonts used and the CSS style sheet. You'll also find seven XHTML files—one for each of the seven pages in the EPUB. You can open these pages in Adobe Dreamweaver to view the source code, preview the web page, and optionally, add more information and functionality.
4. Open the Recipes.css file (in the Lesson15 folder). Examine the HTML codes that control the appearance of three paragraph styles (h1: Main Headlines; h2: Subheads; and h3: Recipe Tagline). Change the color of paragraphs to which the Main Headlines paragraph style is applied by changing its color number from 669933 to DF0101. Save your changes to the Recipes.css file or choose Save As and create a new file with a different name. Export another EPUB. (If you changed the filename, make sure to choose the new file in the Advanced section of the EPUB - Reflowable Layout Export Options dialog box.) Notice the different color applied to the main headlines.

   If you're the adventurous type, try changing some of the other attributes. For example, change the alignment from "center" to "left." Or find some hexidecimal color codes and change the color of the main headlines and subheads.

Tip

Different EPUB readers can display the same EPUB file differently. You should always test exported EPUBS in the readers you want to support.

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5. Open the InDesign file named iPadEPUB.indd that's in the Lesson15 folder. This document contains the same content as the one you worked on during the lesson, but the page size has been changed to 1024 × 768 pixels, the dimensions of an iPad screen, and the layout has been modified slightly to accommodate the different page dimensions. Export this document, but instead of choosing EPUB (Reflowable) in the Export dialog box, choose EPUB (Fixed Layout). To view the exported fixed layout EPUB using Apple iBooks (an app that is automatically included with Mac OS X Mavericks [10.9] and later), select Viewing Apps from the scroll list on the left of the EPUB - Fixed Layout Export Options dialog box, and then choose iBooks. You can also sideload the EPUB file to an iPad using iTunes and open it with iBooks. Leave all other settings in the EPUB - Fixed Layout Export Options dialog box unchanged and click OK.

Review questions

1. When you create a document that you intend to export as a reflowable EPUB, how do you ensure that a graphic maintains its position relative to surrounding text?
2. What is metadata?
3. What panel lets you specify the content to be included in a reflowable EPUB and arrange the order in which the elements are exported?
4. When you export a reflowable EPUB, what option must you choose if you want the content order to be determined by the Articles panel rather than by the page layout?
5. You've specified custom export settings for several graphics frames. How can you override the export settings for these objects during export of a reflowable EPUB?

Review answers

1. To ensure that a graphic maintains its position relative to text in a reflowable EPUB file, anchor it within the text as an inline graphic.
2. Metadata is information about a file, such as its title, its author, the author's title, a description, and keywords. It's a good practice to include metadata in an EPUB because this information can be accessed by search engines and ereaders.
3. The Articles panel (Window > Articles) lets you choose the content you want to include in a reflowable EPUB and arrange the order of export.
4. To ensure that the order of the content is determined by the Articles panel rather than by the page layout, you must choose Same As Articles Panel from the Content Order menu in the General section of the EPUB - Reflowable Layout Export Options dialog box.
5. If you select Ignore Object Export Settings in the Object section of the EPUB - Reflowable Layot Export Options dialog box, any custom export settings you've specified are ignored and the settings specified in the Object section are applied to all images in the EPUB.

16. Creating an iPad Publication

Lesson Overview

In this lesson, you'll learn how to do the following:

- Create a new digital publishing document.
- Add interactive elements, including hyperlinks, movies, panoramas, and pan-and-zoom graphics.
- Preview interactivity.
- Create an alternate layout.
- Create and preview a folio.

This lesson will take approximately 60 minutes.

Download the project files for this lesson from the Lesson & Update Files tab on your Account page at www.peachpit.com and store them on your computer in a convenient location, as described in the Getting Started section of this book.

Your Account page is also where you'll find any updates to the chapters or to the lesson files. Look on the Lesson & Update Files tab to access the most current content.

The digital publishing features in InDesign let you create and preview digital magazines, newspapers, and catalogs that include engaging elements such as 360-degree object rotation and image panoramas and can be displayed on a wide variety of tablets.

Getting started

In this lesson, you'll create a new digital publishing document. After you've set up the new document, you'll open a partially completed version of the publication, add several interactive elements, and then save and preview a folio that can be transferred to and viewed on an iPad.

Note

If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

Important: *To work on this lesson, you must first install the DPS Desktop Tools for InDesign CC (2014 Release).*

1. To ensure that the preference and default settings of your Adobe InDesign program match those

used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 3.

Note

A folio is a collection of digital publishing articles. It gets its name from the .folio file extension used for this type of digital publishing file.

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2. Start Adobe InDesign. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Digital Publishing], and then choose Window > Workspace > Reset Digital Publishing. This optimizes the panel arrangement for the work you'll be doing in this lesson and provides quick access to several of the controls you'll use.
3. To see what the finished document looks like, open the 16_End.indd file in the Lesson16 folder. (If the Adobe Typekit dialog box displays, click Sync Fonts.)
4. Navigate through the pages of the finished document to view the cover page and the four pages that follow. If you open the Pages panel, you'll see that this document contains two five-page layouts: one in landscape orientation and one in portrait orientation.

5. Close the 16_End.indd file after you have finished examining it, or you can leave this document open for reference.

DPS Desktop Tools for InDesign

A full Creative Cloud membership includes the ability to create an unlimited number of Single Edition iPad apps. To create an iPad app, you need InDesign and the DPS Desktop Tools, which add the Folio Overlays panel and Folio Builder panel to InDesign and install the Adobe Content Viewer and DPS App Builder applications.

For more information about downloading and installing the DPS Desktop Tools, go to the Digital Publishing Suite Help | Installing DPS tools web page at: https://helpx.adobe.com/digital-publishing-suite/help/installing-digital-publishing-tools.html.

To distribute your app to Apple App Store, you'll also need to have a Mac OS computer and be a member of Apple's iOS Developer Program. For more information about publishing iPad apps, you can download the *Step-by-Step Guide to Publishing iPad Apps with DPS, Single Edition* at help.adobe.com/en_US/ppcompdoc/Step_by_step_guide_to_dps_se.pdf.

Creating a new digital publication

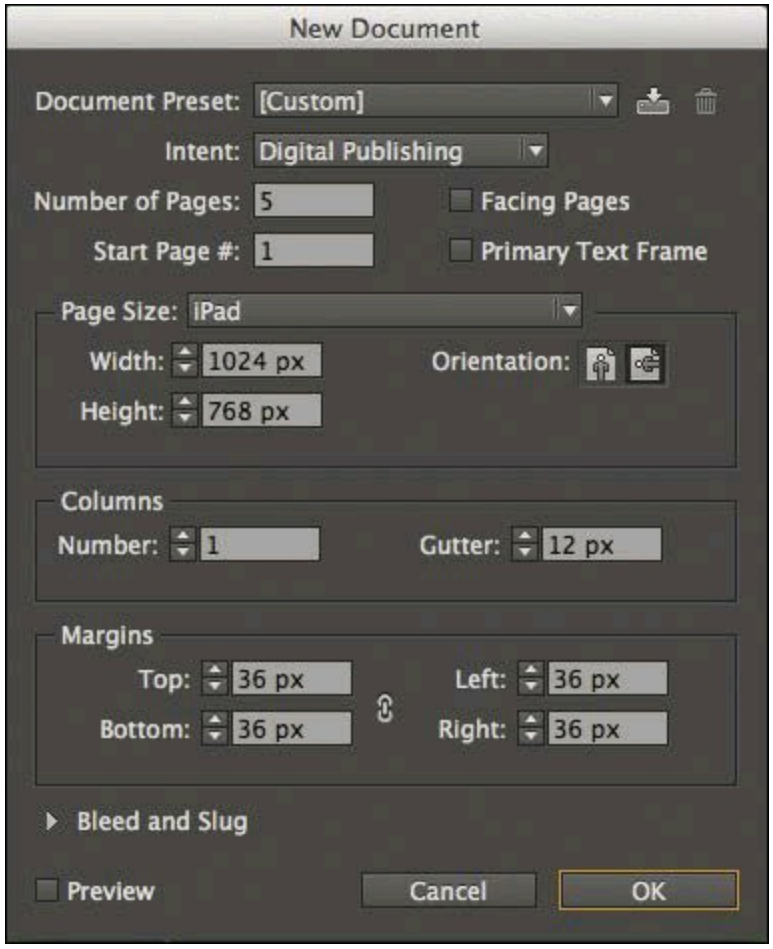
Because digital publications, such as the DPS Single Edition app for iPad that you'll work on in this lesson, are viewed on tablet devices and can include interactive elements (for example, slideshows and pan-and-zoom graphics) that can't be included in print documents, creating a digital publishing document is slightly different from creating a print document. That said, all of the typographic and page-layout features covered in this book are available and work the same when creating digital publications. To begin, you'll create a new digital publishing document.

Note

Setting a new document's Intent to Digital Publishing (or Web) deselects the Facing Pages option, sets the default page orientation to Landscape, and changes the unit of measurement to pixels. It also sets the Transparency Blend Space (Edit > Transparency Blend Space) to RGB and the default color swatches in the Swatches panel to Process RGB for the new document.

1. Choose File > New > Document.
2. In the New Document dialog box, choose Digital Publishing from the Intent menu and iPad from the Page Size menu. Also specify the following:

   In the Number of Pages box, type **5** and deselect Primary Text Frame. Leave all other settings unchanged and click OK.



3. Choose File > Save As, name the file **16_Setup.indd**, navigate to the Lesson16 folder, and click Save.

   Rather than create the remainder of the document from scratch, you'll continue this lesson by opening a partially completed document that already contains most of the required objects. You can keep the 16_Setup.indd document open or close it and continue.

Adobe Digital Publishing Suite: Pricing Options

The Adobe Digital Publishing Suite lets you create folios, preview them on your desktop and mobile devices, and share them with individuals. Using the DPS tools costs additional money only if you want to publish folios and create custom viewer apps that you can submit to stores or distribute privately.

Creative Cloud Membership: Obtain an Adobe Creative Cloud membership. With a full (not individual product) Creative Cloud membership, you can create unlimited single-folio apps for the iPad.

Single Edition: If you're not a Creative Cloud member, you can pay a one-time fee to create a custom application for the iPad that contains a single folio. For more about the Single Edition model, go to http://www.adobe.com/products/digital-publishing-suite-single.edu.html.

Note: *When you use Single Edition to create a single-folio app, you are not charged any additional download fees by Adobe. Only the Single Edition fee and the Apple iOS developer subscription fee are required.*

Professional Edition: With Professional Edition, you pay a subscription fee to create a single multi-folio viewer app that you can submit to supported stores such as the iTunes App Store, Google Play Store, and Windows Store. You can create unlimited built-in single-folio apps for

the iPad. With Professional Edition, you get basic analytic reports to track user data.

Enterprise Edition: Enterprise Edition includes everything in Professional Edition, plus the ability to create multiple multi-folio apps, customize the viewer UI, create custom entitlement servers, and create in-house (private) enterprise apps.

For more pricing information, go to the Digital Publishing Suite Help web page at https://helpx.adobe.com/digital-publishing-suite/topics.html.

For information about creating commercial publications for tablets, as well as resources for developers, go to the Digital Publishing Suite Developer Center at www.adobe.com/devnet/digitalpublishingsuite.html.

Adding interactive elements

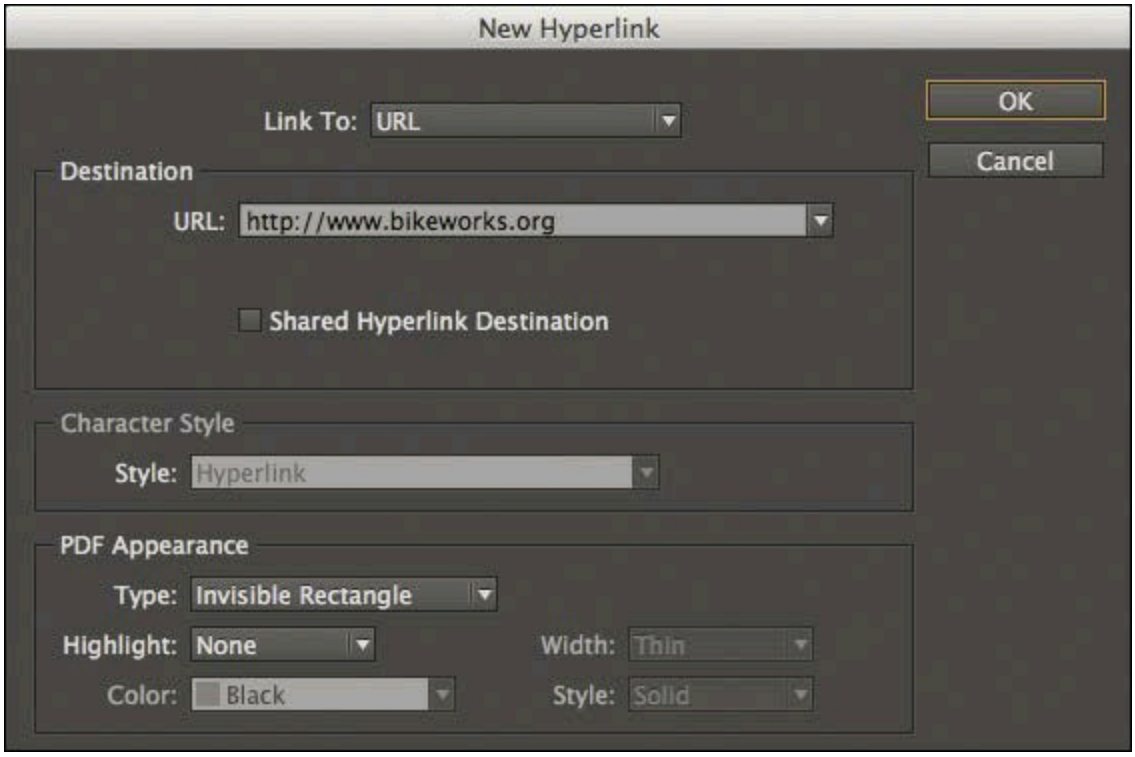
Interactive elements in a digital publication include such things as slideshows of multiple images, buttons that show and hide page elements, hyperlinks, graphics that a viewer can pan and zoom, and movies and sounds. Much as you can modify a graphics frame by adding a stroke, a special effect like a drop shadow, or rotation, you can control the appearance and function of interactive elements.

Rather than creating the entire digital publication from scratch, you'll continue this lesson by opening a partially completed version of the publication and adding the finishing touches by creating several interactive elements.

Creating a hyperlink

Hyperlinks let viewers jump to other locations in a document, as well as to other documents or to websites. A hyperlink includes a source (text, a text frame, or a graphics frame) and a destination, which is the URL, file, email address, page text anchor, or shared destination to which the hyperlink jumps. Next, you'll create a hyperlink to a website using an empty graphics frame.

1. Choose File > Open, and then open the 16_iPadGuidePartial file in the Lesson16 folder.
2. Choose File > Save As, name the file **16_iPadGuide.indd**, and save it in the Lesson16 folder.
3. Select the Rectangle Frame tool ( ), and then drag a rectangle over the entire "D.I.Y. MEET" logo on page 1.
4. Choose Window > Interactive > Hyperlinks, or click the Hyperlinks icon to display the Hyperlinks panel.
5. Choose New Hyperlink from the Hyperlinks panel menu.
6. Select URL from the Link To menu, and type a URL in the URL field (the sample document uses http://www.bikeworks.org). Deselect Shared Hyperlink Destination. Under Appearance, leave Invisible Rectangle and None selected. Click OK.



7. Choose Window > Folio Overlays or click the Folio Overlays icon to display the Folio Overlays panel.

Note

The Folio Overlays panel lets you add interactivity to InDesign layouts designed for viewing on tablet devices, such as the iPad. This interactivity can include pan-and-zoom graphics, slideshows, video, audio, and more.

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8. In the Folio Overlays panel, make sure that Open In Folio is selected. When a viewer taps the hyperlink area defined by the frame, the web page is displayed within an in-app viewer rather than switching to a browser.

Note

The Folio Overlays panel lets you change the behavior of a hyperlink. If you choose Open In Folio, the specified web page opens without leaving the digital publication. If you choose Open In Device Browser, the web page opens in a separate web browser application on the tablet device, for example in Safari on an iPad.

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9. Choose File > Save.

Adding a movie

Adding a movie to a digital publishing document is similar to adding a photo or illustration to a print document. Next, you'll import a movie into the document and use the Media panel to choose a graphic to use as the poster image for the movie. Then you'll use the Folio Overlays panel to control how the movie plays.

1. Use the Selection tool ( ) to select the empty rectangular graphics frame in the upper-right corner of page 1.

2. Choose File > Place and select the Cycling.mp4 video file in the Links folder in the Lesson16 folder. Make sure Replace Selected Item is selected in the Place dialog box, and then click Open.

3. Choose Window > Interactive > Media, or click the Media icon to display the Media panel. If you want, use the controls below the movie image to preview the movie.

Note

A poster image is the static image that's displayed within the frame that contains the placed video when the video is not playing.

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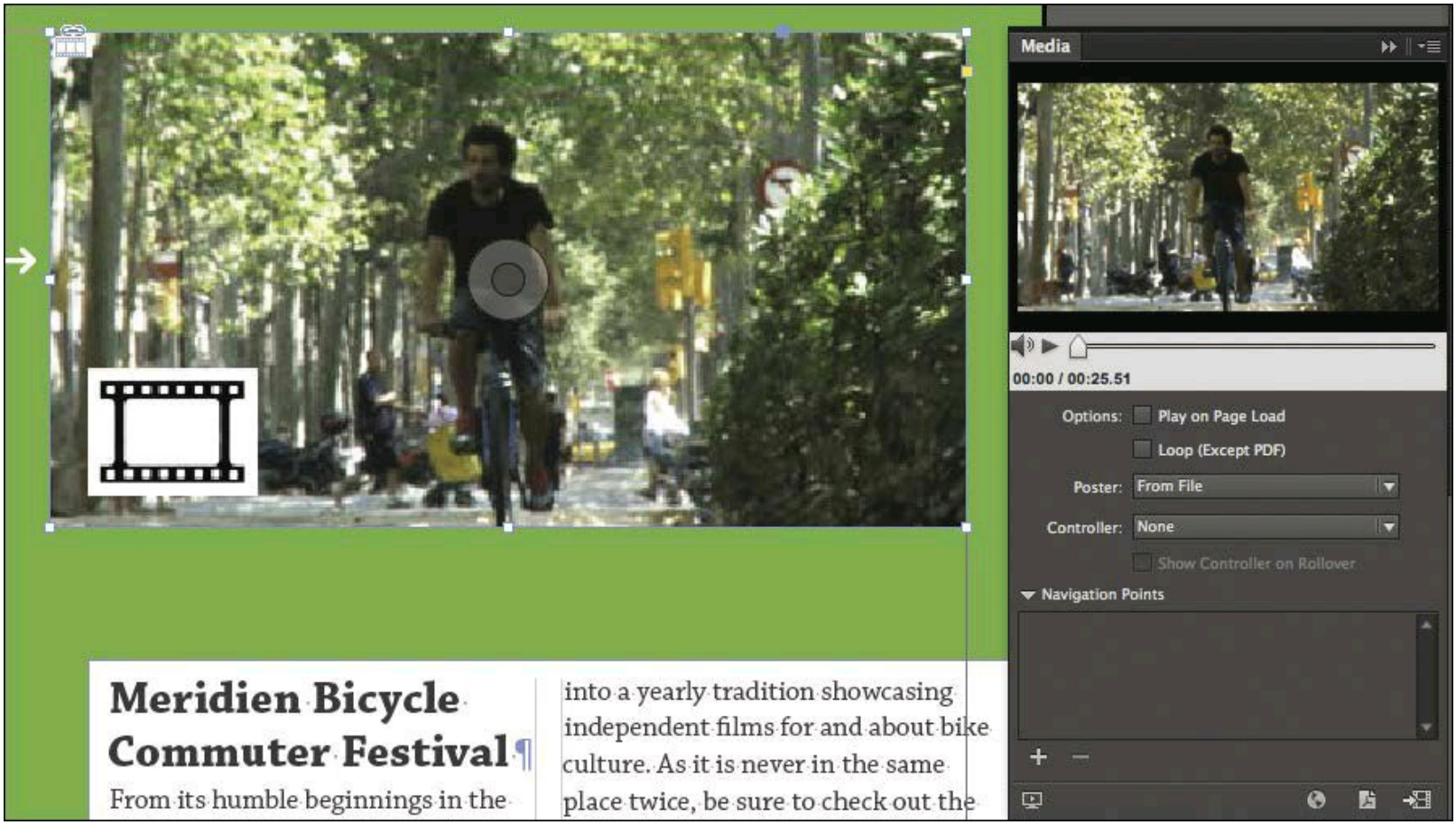
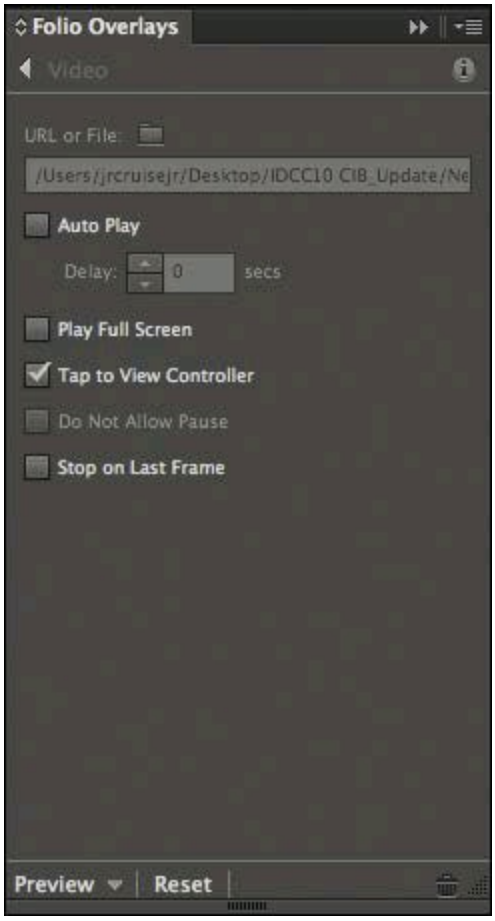
4. From the Poster pop-up menu in the Media panel, choose Choose Image. Select Cyclist.jpg in the Links folder in the Lesson16 folder, and then click Open.



5. With the movie object still selected, make sure that Auto Play and Play Full Screen are not selected in the Folio Overlays panel and that Tap To View Controller is selected.



Tip

When Auto Play is selected, a video starts playing as soon as it's loaded on an iPad. Selecting Play Full Screen plays the video in full-screen mode instead of within the frame area.

6. Choose File > Save.

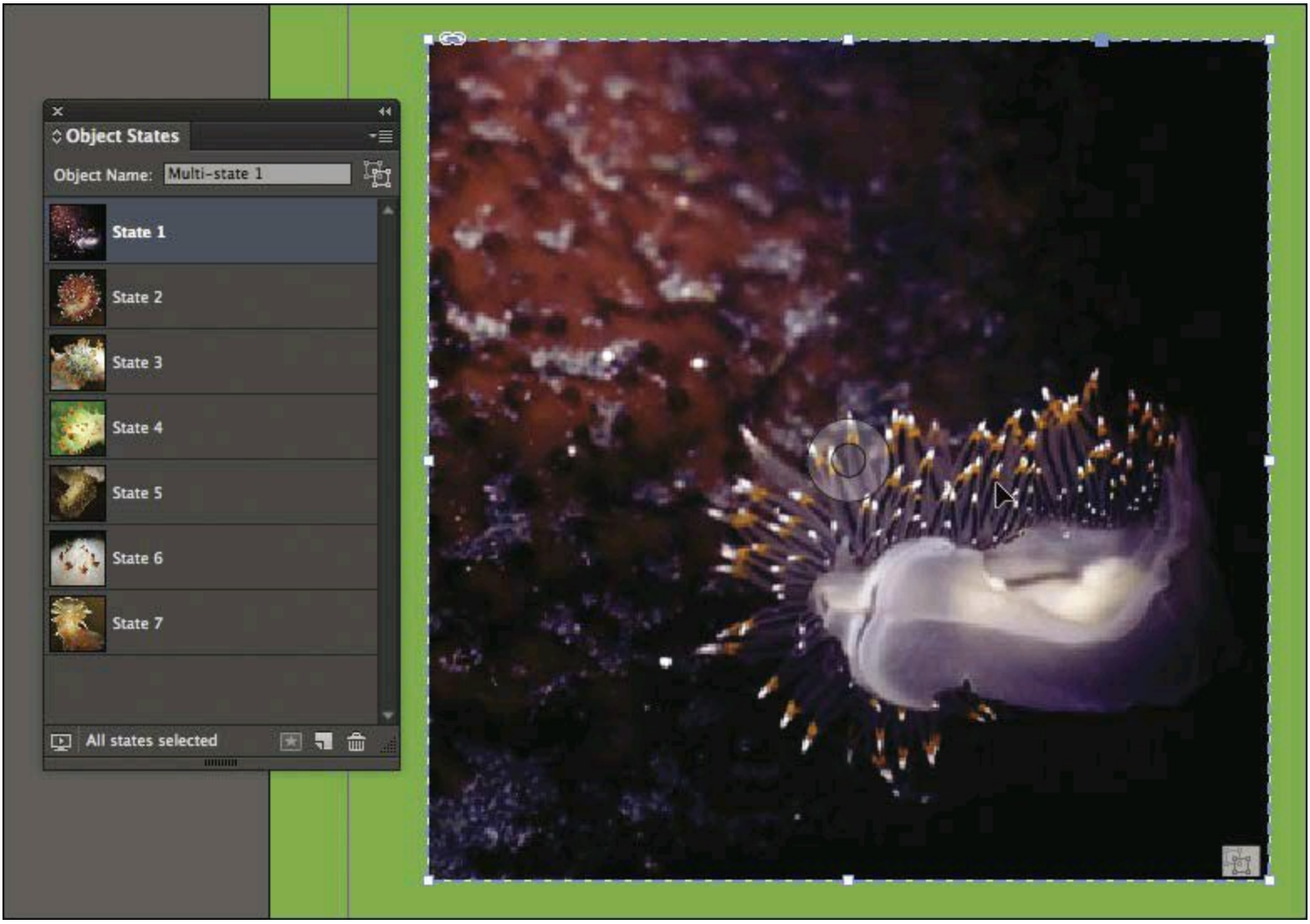
Creating a slideshow

A slideshow is a sequence of images displayed one at a time as a viewer swipes or taps an image or taps separately added Previous and Next buttons. The sample document for this lesson already includes the graphics you need to create an interactive slideshow. You'll arrange these graphics in a stack, convert them into a multi-state object, and then create buttons that enable a viewer to navigate through the slides.

1. Use the Pages panel (Window > Pages) to navigate to page 2, or press Ctrl+J (Windows) or Command+J (Mac OS), enter **2** in the Page box, and then click OK.
2. Select the Selection tool ( ), and then select the frontmost of the seven overlapping graphics frames.
3. Press Shift, and then select each of the other six overlapping graphics frames in succession from front to back. Release the Shift key after you've selected all seven frames.
4. Click the Align Left Edges button ( ) in the Control panel, and then click the Align Top Edges button ( ).
5. With the graphics frames still selected, choose Window > Interactive > Object States or click

the Object States icon to display the Object States panel, and then click the Convert Selection To Multi-State Object button at the bottom of the panel. If necessary, lengthen the panel to display the names of all objects.

Multiple objects selected and aligned.



Graphics frames combined into a multi-state object. Each image appears as a separate state in the Object States panel.

6. In the Object States panel, enter **Sea Slugs** in the Object Name box, and then press Enter or Return.

   Now that you've created a multi-state object, you'll provide a way to let viewers scroll through the images.

7. Use the Selection tool to select the red arrow in the lower-left corner of the page.

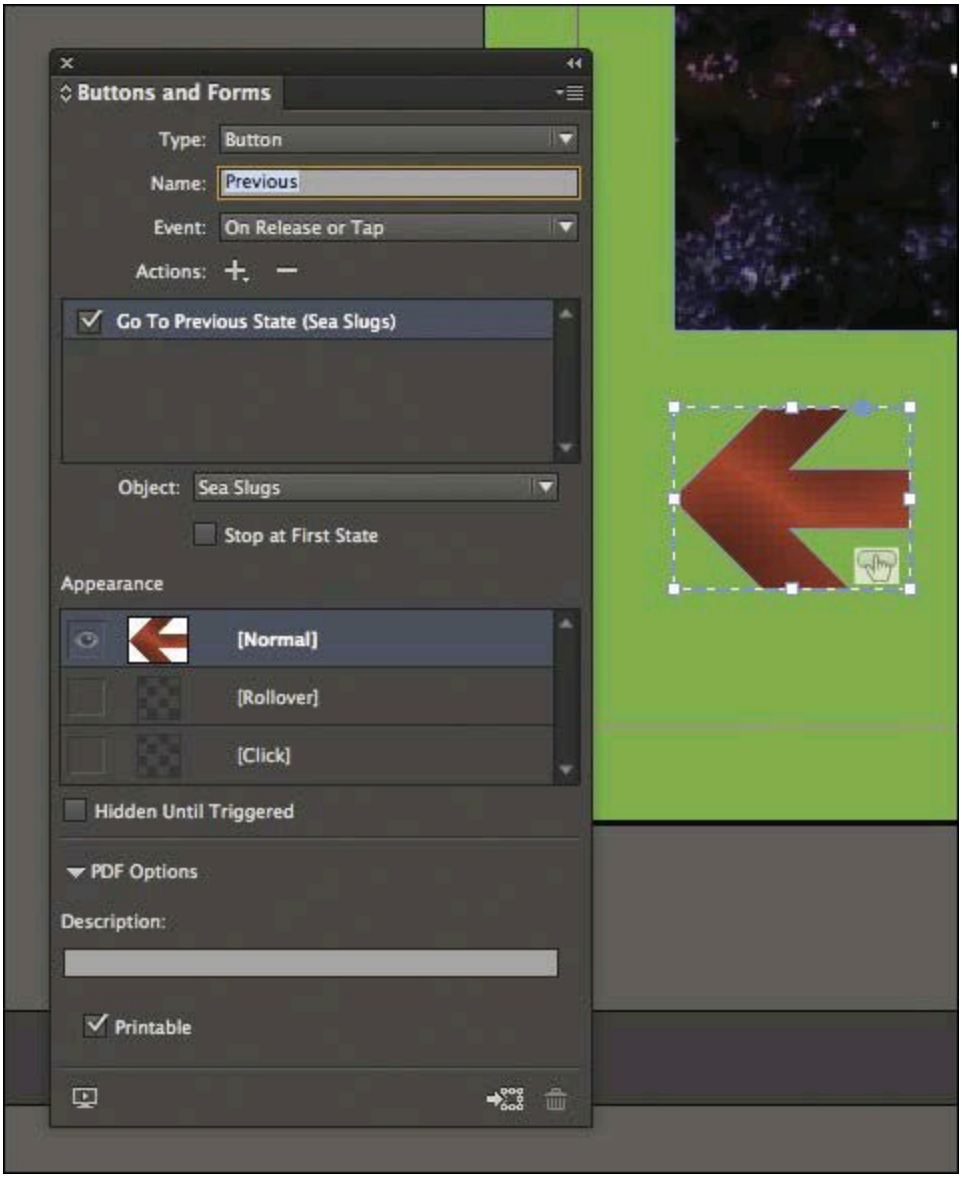
Tip

InDesign automatically selects the Sea Slugs multi-state object because it's the only one on the page. When there are multiple multi-state objects on a page, you may need to choose the correct multi-state object from the Object menu in the Buttons And Forms panel.

---

8. Choose Window > Interactive > Buttons And Forms or click the Buttons And Forms icon to display the Buttons And Forms panel.
9. In the Buttons And Forms panel, click Convert To Button at the bottom of the panel, and then enter **Previous** in the Name box.

10. Click the Add New Action For Selected Event ( ) button next to Actions, and choose Go To Previous State from the menu.



Tip

The "[Click]" appearance will be visible when the viewer positions a finger on the button and doesn't release immediately. The Click appearance will not be visible when a viewer taps the buttons.

Now you'll cause the button's appearance to change slightly when a viewer presses it.

11. With the red arrow still selected, click [Click] in the Appearance area of the Buttons And Forms panel, and then click the Drop Shadow button ( ) in the Control panel.

12. Repeat steps 7–11 to select the red arrow on the right, convert it to a button, name it "Next," apply the Go To Next State action (instead of the Go To Previous State action, as you did in step 10), and give its [Click] appearance a drop shadow.

Tip

In addition to creating Previous and Next buttons to navigate through the images in a multi-state object, you can use the Folio Overlays panel to configure a multi-state object

so that a viewer can tap the image to automatically play the slideshow.

Viewers can tap the arrow buttons to move from image to image, but you can also configure the multi-state object so that viewers can swipe the images to advance through slides.

13. Use the Selection tool to select the multi-state object you created earlier. In the Folio Overlays panel, select Swipe To Change Image.
14. Choose File > Save.

Creating a panorama

A panorama is a graphic that provides a 360-degree view of a scene. A panorama requires six images, with each image representing a side within a cube. A viewer of a panorama can swipe the image in any direction to get a complete view of a scene.

1. Use the Pages panel (Window > Pages) to navigate to page 3, or press Ctrl+J (Windows) or Command+J (Mac OS), enter **3** in the Page box, and then click OK.
2. Use the Selection tool ( ) to select the empty graphics frame on the left side of the page.
3. In the Folio Overlays panel, select Panorama.
4. Click the Select Panorama Assets Folder button ( ), and then select the CourtyardPano folder in the Links folder in the Lesson16 folder. Click Open.

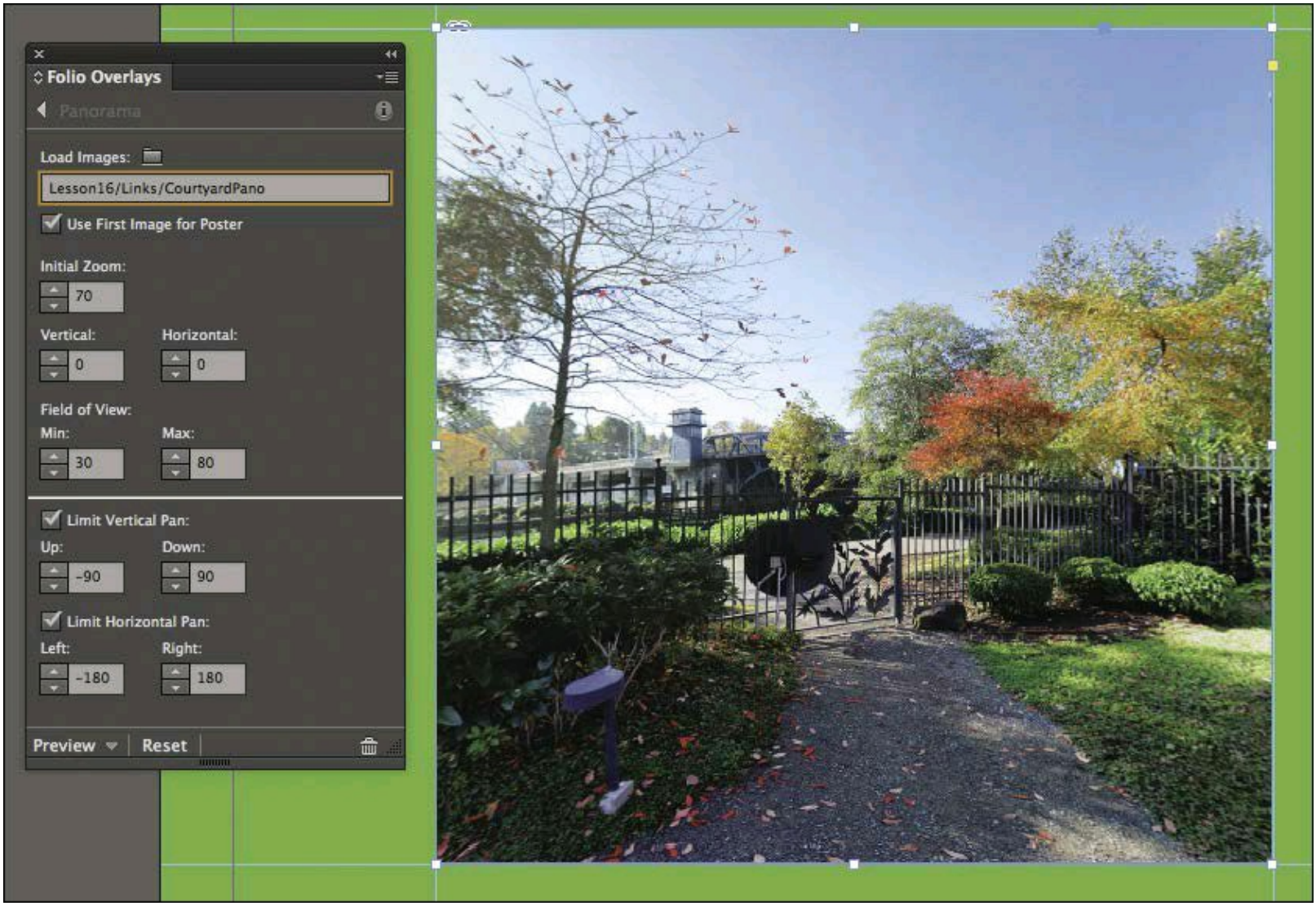
   The placeholder rectangle has assumed the dimensions of the panorama images, but you need to make the click area smaller to fit it on the page.
5. In the Control panel, make sure the upper-left square is selected in the Reference Point Locator at the left end of the panel, enter **40%** in the Scale X Percentage or Scale Y Percentage box, and then press Enter or Return. Because the Constrain Proportions For Scaling button is selected for the Scale X Percentage and Scale Y Percentage boxes, changing either value automatically changes the other.

Note

Selecting the Limit Vertical Pan or Horizontal Pan option limits the amount of tilting to the top and bottom or left and right that can occur when the viewer swipes in those directions.

---

6. With the panorama image still selected, make sure the Limit Vertical Pan and Limit Horizontal Pan options are selected in the Folio Overlays panel.



7. Choose File > Save.

Creating a pan-and-zoom graphic

You can display a portion of a graphic within a rectangular graphics frame and then configure the frame to allow a viewer to pan and zoom the image within the rectangle.

Tip

For best results when creating pan-and-zoom images, use JPEG files. Make sure that the image has the exact dimensions you want to use. For example, if you want viewers to be able to pan a 1024-by-1024-pixel image within a 200-by-200-pixel view area, create a 1024-by-1024-pixel image.

---

1. Use the Pages panel (Window > Pages) to navigate to page 4, or press Ctrl+J (Windows) or Command+J (Mac OS), enter **4** in the Page box, and then click OK.
2. Use the Selection tool to select the empty graphics frame on the left side of the page.
3. Choose File > Place.
4. In the Place dialog box, select the Park.jpg graphic in the Links folder in the Lesson16 folder, select Replace Selected Item, and then click Open.
5. Move the pointer within the content grabber in the middle of the graphic, and then click to

select the graphic. Notice that the graphic's right edge is outside the frame edge. Also in the Links panel, note the dimensions in pixels of the image. These will allow a user to pinch and zoom as well as pan horizontally and vertically.

6. Double-click within the graphics frame to select the frame instead of the graphic.

Tip

To remove Pan & Zoom from a graphics frame, select the frame and choose Off in the Folio Overlays panel.

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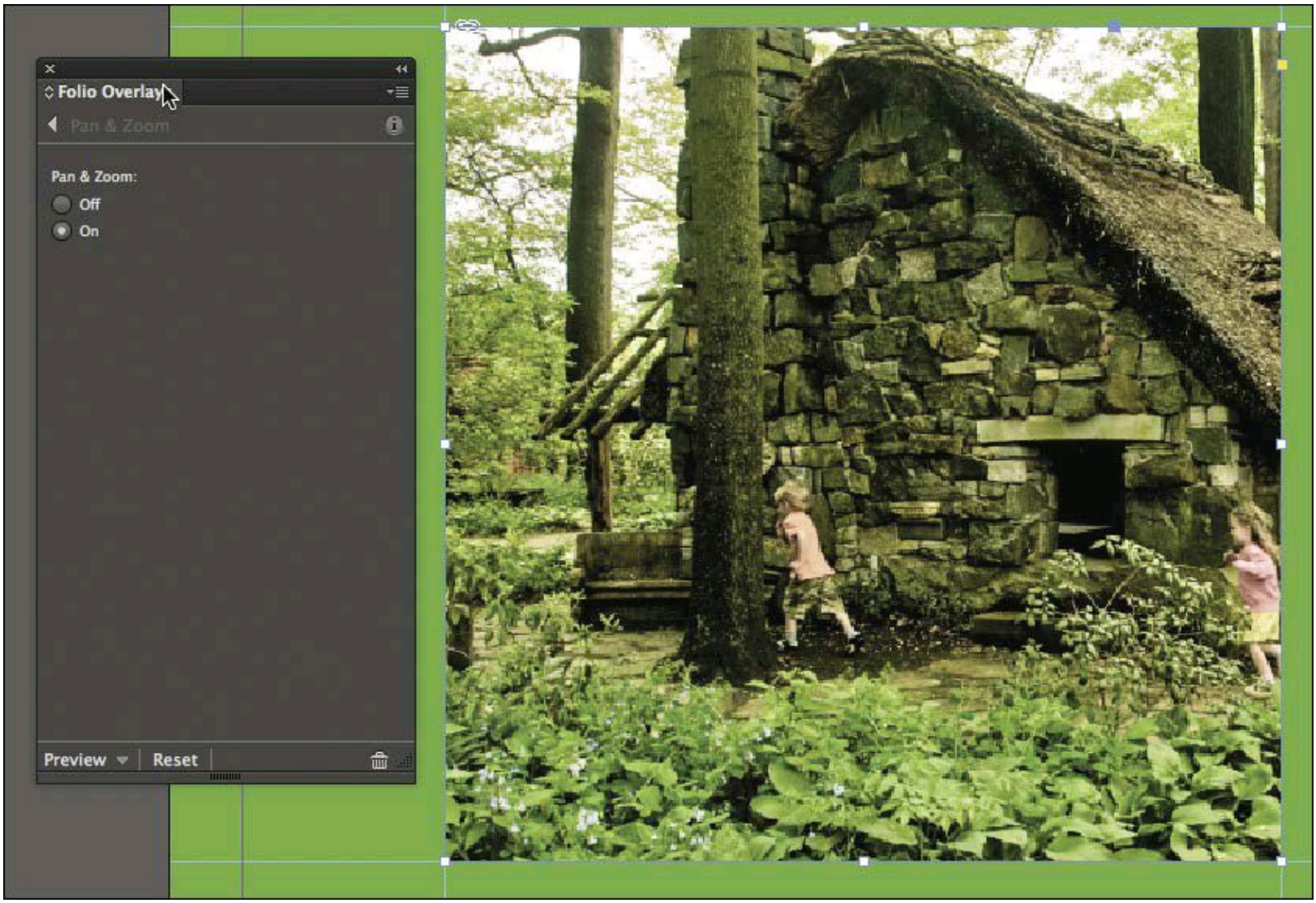
7. In the Folio Overlays panel, click Pan & Zoom, and then select On.



8. Choose File > Save.

Creating a scrollable text frame

In addition to creating pan-and-zoom graphics, you can create scrollable frames that viewers can swipe to view additional content. For example, say you created a list of upcoming events that's too long to fit into its allotted space. Rather than continuing the list on another page and forcing the viewer to navigate through the document, you can create a scrollable frame that a viewer can swipe to see the additional text.

The sample document already contains the two objects you need to create a scrollable text frame—an

empty graphics frame that will function as a container frame and a text frame.

Tip

For best results, make the width of the container frame slightly wider than the content frame to allow space for swiping along the right edge of the container frame. The content frame should not include overset text.

---

1. Use the Selection tool to select the text frame on the pasteboard outside the right edge of the page (page 4).
2. Choose Edit > Cut.
3. Select the empty graphics frame with a black fill in the upper-right corner of the page.
4. Choose Edit > Paste Into to place the text frame into the graphics frame. The Paste Into command aligns the center of the two frames.

Tip

If you position the text frame over the empty graphics frame so that the upper-left corners of the frames are aligned before you choose Edit > Cut, the Paste Into command will remember the text frame position so you don't need to reposition it after you choose Paste Into.

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5. Select the Direct Selection tool ( ), and then move the pointer within the text frame. Notice that the top and bottom edges of the text frame are outside the container frame, while the left and right edges are inside.
6. Drag the text frame down and to the left until the upper-left corners of the two frames are aligned. Notice the thin vertical strip of the container frame outside the right edge of the text frame. This area will allow a viewer to swipe the text without obstructing the view.

7. Use the Selection tool to select the container frame, and then click Scrollable Frame in the Folio Overlays panel.

Tip

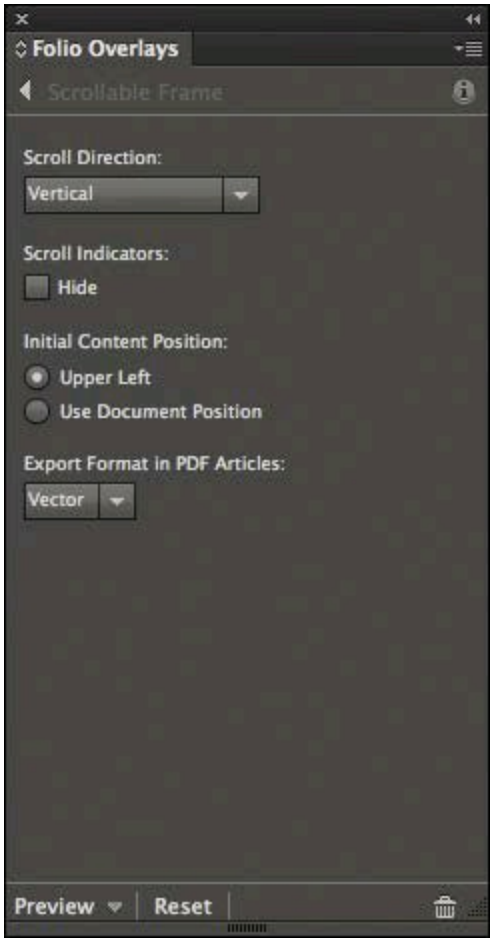
To include multiple objects, such as graphics, as part of the scrollable content in a Scrollable Frame, first group all of the objects by selecting them and choosing Object > Group, and then choose Edit > Paste Into.

Tip

When working with a scrollable frame, select Upper Left for Initial Content Position in the Folio Overlays panel to ensure that the scrollable content always starts in the upper-left corner, regardless of the content's position in the document. To retain the position in the document itself as the starting point for the scrollable frame, select Use Document Position.

---

8. Choose Vertical from the Scroll Direction menu.



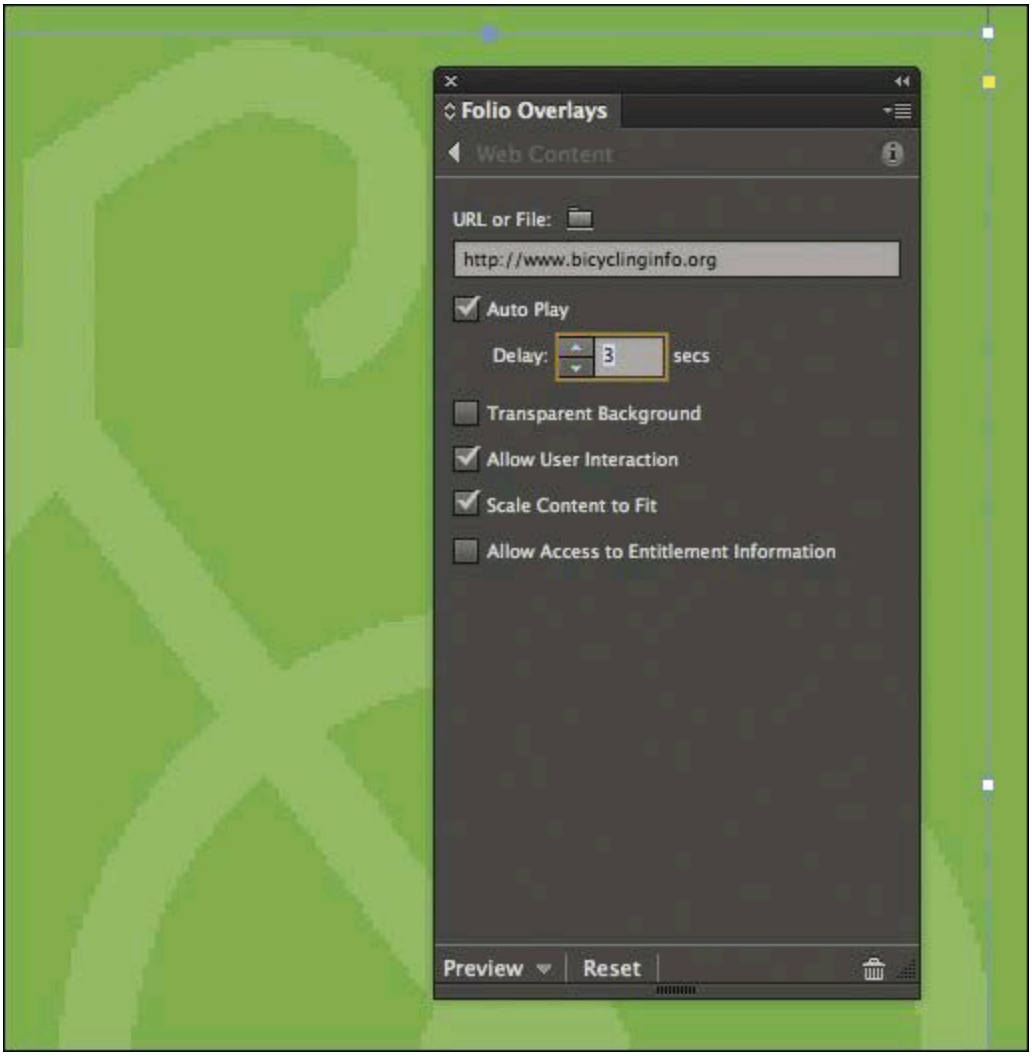
9. Choose File > Save.

Creating a web content overlay

The web content overlay lets you display a web page within a view area. Viewers can see the web page content in the view area rather than switching to a browser, as can be the case with URL-based hyperlink overlays. (The hyperlink you created earlier in this lesson was configured to open within an in-app viewer rather than a browser.)

When you create a web content overlay, you can specify a URL or a local HTML file. If you choose a local HTML file, make sure that the HTML file and all its associated files and folders, such as images and scripts, are stored in the same folder.

1. Use the Pages panel (Window > Pages) to navigate to page 5, or press Ctrl+J (Windows) or Command+J (Mac OS), enter **5** in the Page box, and then click OK.
2. Use the Selection tool to select the large graphics frame that contains the bicycle graphic.
3. Choose Web Content in the Folio Overlays panel.
4. Type a URL in the URL Or File box (the sample document uses http://www.bicyclinginfo.org), and then select Auto Play and enter **3** in the Delay box to automatically display the specified web page 3 seconds after a viewer opens the page. Select Scale Content To Fit and leave the other settings unchanged.



5. Choose File > Save.

Previewing and testing overlays

The interactive elements that you create using the Folio Overlays panel cannot be previewed in InDesign. That is, you can see them and modify them, but you can't interact with them as an iPad viewer can. Instead, you can preview and test interactivity using the Adobe Content Viewer application. Next, you'll preview the page you just worked on and, optionally, test some of the interactive elements you've created.

Tip

If you've installed and opened the Adobe Viewer app on your iPad and your iPad is connected to your computer, the Preview menu in the Folio Overlays panel provides an additional option that lets you preview the document on your iPad.

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1. Click Preview in the lower-left corner of the Folio Overlays panel, and then choose Preview On Desktop. If it's installed on your computer, Adobe Content Viewer opens and displays the page that's currently displayed in InDesign. Because Allow User Interaction was selected by default in the Folio Overlays panel for the web content overlay you created, the hyperlinks on the web page are functional, and you can click them to navigate to other web pages.
2. While you're in Adobe Content Viewer, you can navigate to the other pages in the publication by dragging. For example, drag page 5 downward to display page 4. If you want, you can test

the other interactive elements that you created earlier in this lesson.

3. When you've finished previewing the publication, quit Adobe Content Viewer and return to InDesign.

Creating an alternate layout and applying liquid layout rules

Tablet devices can display pages in either portrait or landscape orientation. To take advantage of this capability, InDesign lets you create alternate layouts within the same InDesign document.

The Alternate Layout feature duplicates the content of the existing layout, placing it on new pages with an alternate page size. The ability to include both the portrait and landscape layouts for a tablet application in one InDesign document simplifies the task of designing for tablets and helps ensure that text, linked images, and interactivity are consistent across multiple layouts. Alternate layouts are intended to make the design process faster, but most layouts still require human judgment and manual adjustments.

Next, you'll create an alternate vertical layout and assign a liquid page rule to determine how the objects on a page are adapted in the alternate layout. You'll then modify the layout of one of the pages in the alternate layout to accommodate the change in orientation.

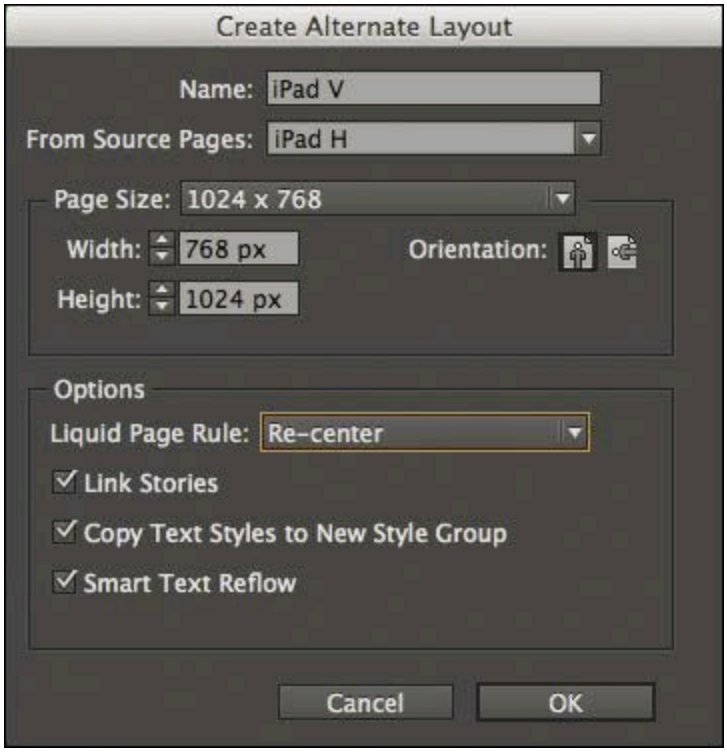
1. Use the Pages panel (Window > Pages) to navigate to page 2, or press Ctrl+J (Windows) or Command+J (Mac OS), enter **2** in the Page box, and then click OK.
2. If the Pages panel is not open, choose Window > Pages or click the Pages icon to open it.
3. Choose Create Alternate Layout from the Pages panel menu.

Tip

In addition to assigning global liquid layout rules when you create an alternate layout, you can assign any of the four liquid layout rules—Re-center, Scale, Object-based, or Guide-based—to individual pages, and you can assign object-based constraints to individual objects using the Liquid Layout panel (Window > Interactive > Liquid Layout). For example, you can "pin" an object to the edge of a page.

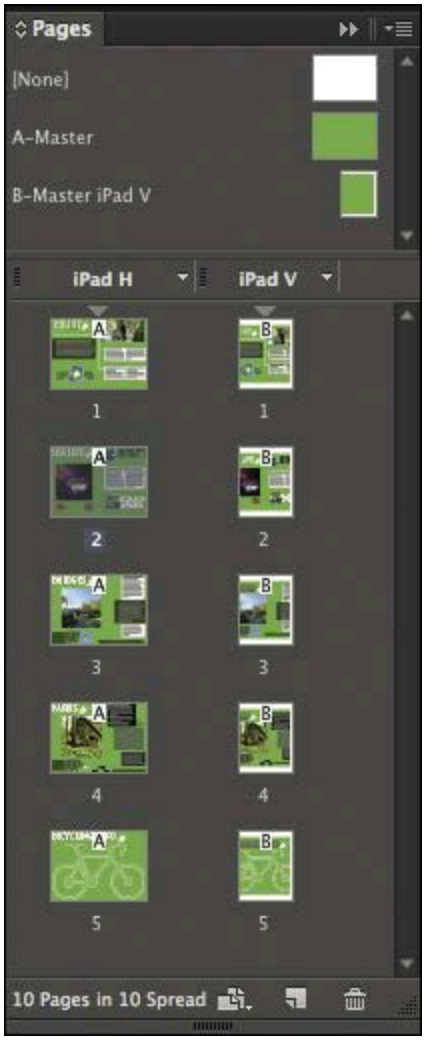
---

4. In the Create Alternate Layout dialog box, choose Re-center from the Liquid Page Rule menu. Leave all other settings unchanged. Notice that the new layout is assigned the name iPad V (a portrait orientation) and that iPad H, the layout you've been working on, is the source. Click OK to close the dialog box.



5. Notice how the pages of the new layout are displayed in the panel. If necessary, drag the horizontal bar that separates the master page thumbnails from the document page icons so that you can see the B-Master iPad V master page thumbnail. This master page was generated when you created an alternate layout.

You need to make a modification to the B-Master iPad V master page, after which you'll modify page 2 in the alternate layout by adjusting the position of the objects on the page.



6. Double-click the B-Master iPad V master page thumbnail in the Pages panel to display it, and then choose View > Fit Page In Window.
7. Use the Selection tool ( ) to resize the green frame so that its edges align with the edges of the page.
8. Double-click page 2 of the iPad V layout in the Pages panel to display it. Notice that the page contains all of the objects in the source layout and that the objects are unchanged.
9. Use the Selection tool to reposition the objects on the page so that they resemble the following image. The text frame with the “Sea Slugs ...” headline is the only object that requires resizing.

Rather than adjust the objects on the remaining pages, you'll continue by opening a document

that already includes these changes, and then you'll complete the lesson by creating and previewing a .folio file.

10. Choose File > Save.

Creating and previewing a .folio file

To prepare a document for publication through Adobe Digital Publishing Suite, you need to build a .folio file. You can preview your .folio file on your computer or tablet with Adobe Content Viewer, and you can share it with colleagues or clients who have Adobe Content Viewer.

1. Choose File > Open, and then open the InDesign document named 16_iPadGuideComplete.indd in the Lesson16 folder.
2. Choose Window > Folio Builder, or click the Folio Builder icon in the stack of docked panels.
3. Choose New Folio from the Folio Builder panel menu, or click the Create New Folio button at the bottom of the Folio Builder panel. If the Creative Cloud Sign In dialog box appears, sign in with your Creative Cloud Adobe ID and password or click Cancel.

Note

When you're signed in to your Adobe account, you have the option to create new folios that are not offline. You can share online folios with others, for example, customers who need to review folios. If you're not signed in, you can create only local folios, which are available only on your computer and cannot be shared.

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4. In the New Folio dialog box, enter City Guide in the Folio Name field. Make sure that the Portrait And Landscape Folio icon is selected for Orientation. If you're signed in to your Adobe account, select Create Offline Folio. (If you're not signed in, an offline folio is automatically created.) Click OK to close the dialog box.

5. Click the Add Article button at the bottom of the Folio Builder panel and choose Add Open InDesign Document to add the current document.

Note

You can add multiple articles to a Folio. By default, when navigating through a folio with multiple articles you swipe left and right to move between articles and up and down to move within an article. Selecting Horizontal Swipe Only in the New Article dialog box changes this default behavior.

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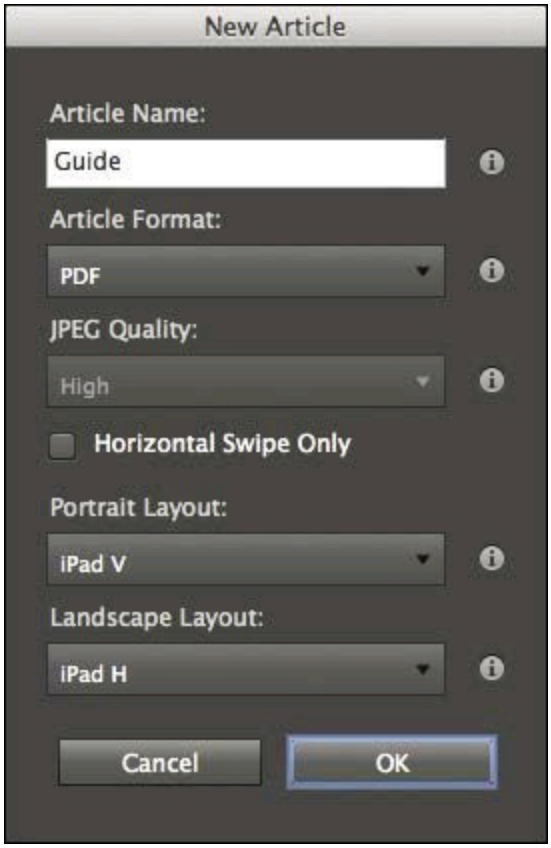
6. In the New Article dialog box, enter **Guide** in the Article Name field. Leave all other settings unchanged, and then click OK to close the dialog box. If an alert is displayed, click Save to save your changes.



7. With the Guide article selected in the Folio Builder panel, choose Article Properties from the Folio Builder panel menu, enter **Meridien Bicycle Festival** in the Title field, and enter **A new year brings a new format for a popular event** in the Description field. Leave all other options unchanged. Click OK.
8. Click the Back To All Folios button at the top left of the Folio Builder panel, and select the City Guide folio. Choose Folio Properties from the Folio Builder panel menu. Type **Meridien City Guide** as the Publication Name.

Tip

The Cover Preview settings determine the preview for the folio that's displayed in the iPad viewer's library. You can create preview images as JPEG or PNG files and specify the size of the folio, for example 1024 × 768 pixels for the iPad.

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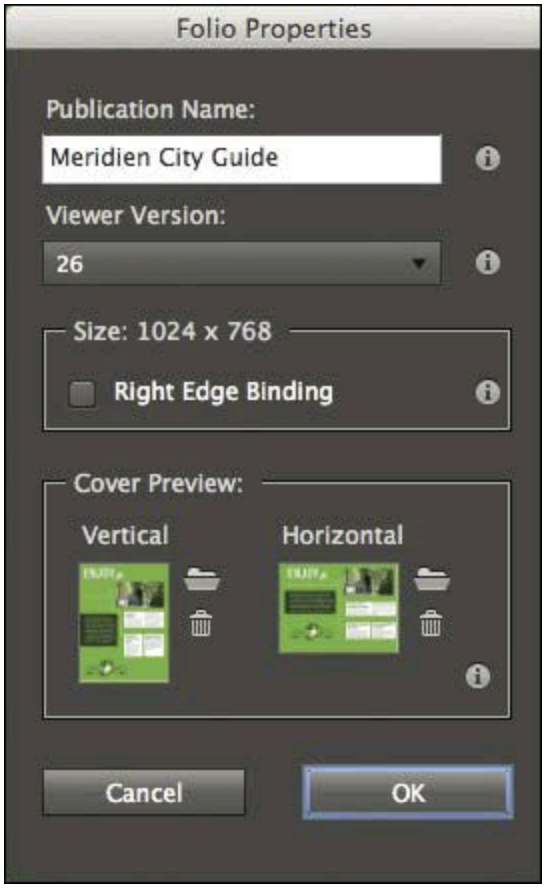
9. Click the folder next to the Vertical preview rectangle in the Cover Preview area, and then select and open the graphic file named cover_vertical.jpg in the Links folder within the Lesson16 folder. Click the folder next to the Horizontal preview rectangle in the Cover Preview area, and then select and open the cover_horizontal.jpg graphic in the Links folder inside the Lesson16 folder. Click OK to close the Folio Properties dialog box.
10. To preview the folio, select the folio in the Folio Builder panel, click the Preview button at the bottom of the panel, and then choose Preview On Desktop.



The document opens in landscape view in Adobe Content Viewer. You can use the Up Arrow and Down Arrow keys to navigate between pages, and you can test all of the interactive elements as you did earlier. Choose View > Portrait to display the vertical layout. When you've finished previewing the document, quit Adobe Content Viewer and return to InDesign.

11. Choose File > Save.

Congratulations! You've created an iPad publication with interactivity and horizontal and vertical layouts.

Exploring on your own

For extra practice, you can create additional alternate layouts and experiment with the liquid layout rules that you didn't use earlier in the lesson.

1. If it's not still open, open the 16_iPadGuide.indd document that you worked on earlier in this lesson and navigate to page 1 of the iPad H layout. Choose View > Fit Page In Window.
2. Choose Create Alternate Layout from the Pages panel menu.
3. In the Create Alternate Layout dialog box, enter **iPad V#2** in the Name field, choose Scale from the Liquid Page Rule menu, and then click OK.
4. Enlarge the Pages panel so that you can see all of the page icons for the three layouts in the document. Double-click page 1 of the iPad V#2 layout to display it, choose View > Fit Page In Window, and then choose Window > Arrange > Split Window.
5. Click within the window on the right, and then double-click page 1 of the iPad V layout to display it in the window. Choose View > Fit Page In Window.

Tip

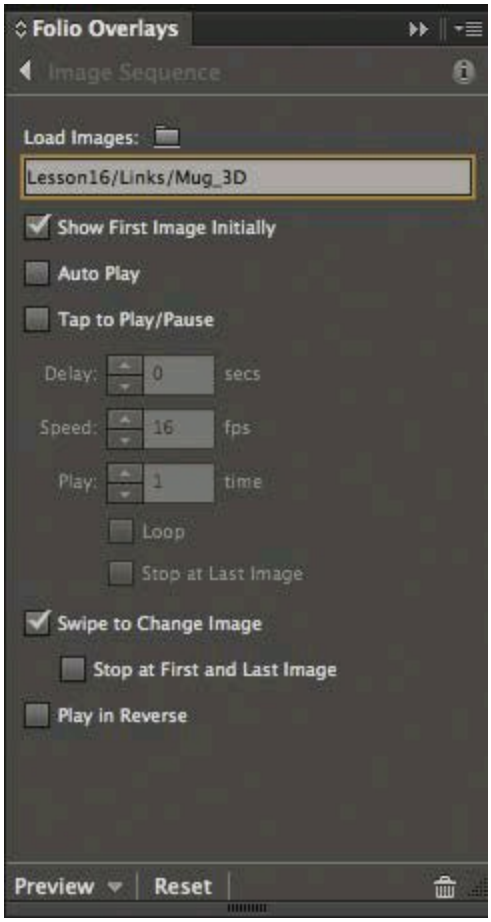
When deciding on liquid layout rules, Scale works best when you're adapting a page for a layout that has the same aspect ratio and orientation. Re-center is appropriate when you're repurposing content for a similar device and orientation with a larger size. Guide-based is useful for simpler pages that include mostly text and a few images. Object-based lets you customize the way each object will be adjusted for the new page.

Notice the differences between the page on the right—the iPad V layout, which was created using the Re-center liquid layout rule—and the page on the left, which was created using the Scale rule. All of the objects in the iPad V layout retained their original size in the alternate layout, while all of the objects in the iPad V #2 layout were scaled down so that the entire page fits within the dimensions of the alternate layout.

6. Choose Window > Arrange > Unsplit Window.
7. In the Pages panel, double-click page 1 of the iPad H layout to display it. Create another alternate layout and name it **iPad V#3**, but this time choose Guide-based from the Liquid Page Rule menu in the Create Alternate Layout dialog box. Compare pages across the three alternate layouts to see how the liquid layout rule you chose affected the resulting layouts.
8. Create another alternate layout and name it **iPad V#4,** and choose Object-based from the Liquid Page Rule menu. Again, compare pages across the alternate layouts to see how the liquid layout rules affect the resulting layouts.
9. Close the document without saving changes.

One type of overlay you didn't create in this lesson is an image sequence. An image sequence is similar to a multi-state object in that it allows a viewer to see a series of images. When you create an image sequence, you can configure the sequence to play when the user swipes the image or to play automatically when the viewer taps the image.

1. Create a new document. In the New Document dialog box, select Digital Publishing from the Intent menu and leave all other settings unchanged.
2. Use the Rectangle Frame tool ( ) to create a placeholder frame for the image sequence anywhere on the page. Any size frame will work for the placeholder.
3. In the Folio Overlays panel, click Image Sequence.
4. Click the folder button next to Load Images, and then locate and select the folder named Mug_3D in the Links folder within the Lesson16 folder. Click Open.



5. Click the Preview button at the bottom of the Folio Overlays panel and choose Preview On Desktop to view the file in Adobe Content Viewer. (In Adobe Content Viewer, drag horizontally in either direction to play the sequence.)
6. Return to InDesign and change some of the settings in the Folio Overlays panel. For example, select Auto Play. Then preview the page again. Continue to experiment with other controls.
7. When you're finished experimenting, close the document without saving changes.

Review questions

1. If you intend to create a publication for an iPad or other tablet device, what Intent must you choose in the New Document dialog box?
2. What panel contains the controls required to create interactive elements such as hyperlinks, slideshows, and panoramas for iPad publications?
3. How can you preview interactivity that you've added to an iPad publication?
4. If you specified a horizontal layout (landscape orientation) when you first created an iPad publication, what must you do if you want to allow viewers to see vertical page layouts as well?
5. What panel do you use to create a .folio file that can be viewed on an iPad?

Review answers

1. Choose Digital Publishing from the Intent menu in the New Document dialog box if you want to create a publication for an iPad or other tablet device.
2. The Folio Overlays panel lets you create interactive elements for iPad publications.

3. To preview interactivity, click the Preview button at the bottom of the Folio Overlays panel, and then choose Preview On Desktop. InDesign generates a .folio file and opens it automatically in Adobe Content Viewer. If an iPad is connected to your computer and the Adobe Viewer app is open, the Preview button lets you preview interactivity on the iPad.

4. To allow viewers to see both landscape and portrait versions of pages, you must create an alternate layout with a vertical orientation.

5. The Folio Builder panel lets you create .folio files.

Index

A

AATC (Adobe Authorized Training Centers), 5
Acrobat, 332–333, 335
Acrobat Distiller, 340
Add Anchor Point tool, 105
Adobe Acrobat, 332–333, 335
Adobe Acrobat Distiller, 340
Adobe Authorized Training Centers (AATC), 5
Adobe Bridge
    accessing files with, 279–280
    accessing original files, 279–280
    Browse In Bridge command, 279
    described, 11, 278
    importing graphics, 278–280
    launching, 11, 30, 279
    naming/renaming files, 279
    obtaining, 11
    reducing window size, 279
    storing snippets in, 277
Adobe certification, 5
Adobe Certified Associate exams, 4
Adobe Certified Instructors, 5
Adobe Content Viewer, 388
Adobe Creative Cloud, 4
Adobe Digital Editions software, 358
Adobe Digital Publishing Suite, 378
Adobe Download Center, 11
Adobe Illustrator, 255–256, 335. *See also* Illustrator files
Adobe InDesign. *See* InDesign
Adobe InDesign Read Me file, 2
Adobe InDesign Support Center, 4
Adobe Paragraph Composer, 178–181
Adobe PDF files. *See* PDF files
Adobe Reader, 333
Adobe TV, 4
Adobe Typekit font library, 142
Adobe Viewer app, 388
Adobe.com, 4

Advanced command, 20
aliases (Mac), 4
Align panel, 114–115
aligning text
    with baseline grid, 161–162
    centering, 61–62, 91–92
    considerations, 34
    justified text, 188
    Optical Margin Alignment, 173–174
    right-alignment, 60
    stories, 161–163, 172–174
    to tabs, 182–183, 184
    vertically, 91–92, 161–164
alignment
    drop cap letters, 176
    graphics captions, 99–100
    margins, 161–162, 173–174
    objects, 85, 114–115
    paragraphs, 172–174
    Smart Guides, 85
    text. *See* aligning text
alpha channels, 264–268
Amazon Kindle, 358
anchor points, 88–89, 105–106, 273
anchored graphics, 360–361, 367
anchored graphics frames, 270–273
anchored objects, 211
App Store, 377
AppData folder (Windows), 3
Apple App Store, 377
Apple iBooks, 358
Application bar, 9, 11, 14
Application frame, 11
Arabic numerals, 70–71
Arrange Documents button, 14
arrow key gestures, 96
arrow keys, 32, 44, 218
Articles panel, 364–367
Auto Play option, 381
Autocorrect feature, 151
autoflow feature, 129–131

Auto-Size feature, 133–134

B

background layers, 84, 269, 303
backgrounds
    changing, 105–106
    master pages as, 55
    removing, 261–263
    transparent, 264, 274
Balance Ragged Lines feature, 181
barcodes, 118
Barnes & Noble Nook, 358
baseline grids, 161–164, 173
best practices, 47
bevel effect, 315
bitmap graphics
    applying transparency effects to, 311
    printing, 97
    resizing, 97
    vs. vector graphics, 255–256
bleed area, 31, 54, 336, 337
bleed guides, 66, 73
Bleed mode, 31
bleed settings, 54, 337
bleed values, 54
bleeds, 13
Blending Mode settings, 306
blending modes, 306, 308–309, 314
blends, gradient, 206, 207
borders
    changing to strokes, 203–204
    rows, 293
bounding boxes, 96–98, 106, 107
break character, 90, 91, 126, 131
Bridge. *See* Adobe Bridge
brightness, 197
Browse In Bridge command, 279
bullet character, 188
bulleted lists, 186
buttons
    converting frames to, 347–348, 354
    page, 22

radio, 348–349
sample, 348–349, 354
Buttons And Forms panel, 347–352, 354

C

calibrating monitor/printers, 193, 197
captions, 99–100
cell strokes, 290, 292
cells. *See also* tables
editing cell strokes, 292
fill color, 291–292
graphics in, 294–295
lines around, 292
merging, 288
overset, 299
styles, 239–242, 295–298
centering
graphics, 114–115
objects, 114–115
spreads, 56, 75
text, 61–62, 91–92
certification, 5
chain icon, 133
Channels panel, 266–267
Character panel, 161, 165, 177
character styles. *See also* styles
applying, 39–40, 228–229
creating, 39–40, 227–228
described, 37
formatting text for, 38
mapping to export tags, 361–363
nesting in paragraph styles, 230–235
Character Styles panel, 38–40, 227–231
characterizing monitors, 197
characters. *See also* text
adding strokes to, 175
drop caps, 174–176, 231
end-of-story, 167
formatting, 12
fraction, 169–170
glyphs, 165–170, 340

hidden, 31, 91, 182, 270, 360
nonprinting, 31
replacing with glyphs, 166–167
selecting, 34
special, 92, 135, 167–170, 188
styles. *See* character styles
child masters, 63
Classroom in a Book files/fonts, 2–3
Clear Effects button, 306
Clear Overrides feature, 126
Click appearanace, 383
clipping paths, 261–263, 267–268, 273
CMYK color model, 32, 210, 329, 338
CMYK process color, 200, 208
CMYK values, 193, 208
color, 190–219
applying with Control panel, 203
applying with Eyedropper tool, 202
applying with Swatches panel, 201
CMYK. *See* CMYK color
colorizing grayscale images, 303–305
copying, 200, 202
creating, 199–200
dashed strokes, 203–204
fill, 291–292
fills, 43, 116–117, 201–203, 244
gradients. *See* gradients
importing, 218
LAB, 208
light level and, 195
monitors, 208
names for, 199–200
objects, 201–203, 212–213
Pantone, 210, 334
paper, 202
presets, 194
previewing, 208
print, 198–199, 208
process, 208
proofing onscreen, 196
RGB, 32, 208, 338

rows, 243–244
specifying settings in InDesign, 194
spot, 208, 210–211, 339, 341
strokes, 43, 44–45, 201–203, 213
swatches, 116–117, 199–201
text, 211–212
tints, 209–210, 212–214
tools, 10
Undo feature, 201
viewing environment for, 195
color gamuts, 208
color management, 193–197
color models, 32, 210, 329
Color panel, 199
color profiles, 197
color separations, 208, 333–334, 338, 341
Color Settings dialog box, 194
color settings file (CSF), 194
color stops, 205–206, 321
color temperature, 195
Color Theme menu, 25
Column Break character, 125
columns. *See also* table columns
balancing, 171–172
breaking, 90, 91, 131
changing number of, 9, 11, 53
creating, 127
fine-tuning, 170–172
flowing text in. *See* text flows
guides, 69
gutters, 90
headlines, 170–171
left/right pages, 61
multiple, 90–91
options for, 53, 64, 69
“straddle head,” 170–171
threaded frames, 35–36, 127
types of, 9
combo boxes, 347, 349–350
commands. *See also specific commands*
key, 11, 21, 26

magnification, 14, 20–22
menu customization, 19
view, 20–21
Community Help, 11
Composite CMYK option, 338
Composite Gray option, 338
content. *See also* stories; text
centering, 56, 75
choosing for eBooks, 364–367
layer, 81, 82, 84
placing into table cells, 294–295
reordering in eBooks, 366
selecting, 117
snippets, 277
web content overlay, 387–388
Content Collector tool, 101
Content Conveyor panel, 101–102
content grabber, 42, 82, 97
Content Placer tool, 101
context menus, 24, 98, 117, 167
contrast, 197
Control panel
applying colors to objects, 203
formatting text, 34, 38
illustrated, 9
overview, 12
“copy,” 35
copying
color, 200, 202
fonts, 330, 331
objects, 136
styles, 233
table cell content, 294
text, 120, 152
via drag/drop, 152, 264
corner effects, 111–112
cover page, eBooks, 364–365
Cover Preview settings, 392
Create Guides command, 57
Creative Cloud, 4, 142, 378
Creative Cloud membership, 377, 378

creative.adobe.com, 11
crop marks, 337
cropping images, 42, 94
CSF (color settings file), 194
CSS style sheets, 369–370, 371
Current Page Number option, 61

D

dashed strokes, 203–204
Defaults file, 3–4, 8
devices, 193. *See also specific devices*
digital publications. *See* iPad publications
Digital Publishing Suite Help, 377, 378
Direct Selection tool
    reshaping text frames, 88–89, 105–106
    selecting objects with, 88–89, 116, 117
    switching to/from Selection tool, 89, 105
Discretionary Line Break character, 180
Display Performance menu, 192, 193
Display Performance preference, 8, 25
displays. *See* monitors
dock
    described, 15
    dragging panels to/from, 16
dock, working with, 15–17
docked panels, 9–17
Document fonts folder, 330
document page icons, 55, 58, 64
document windows, 8, 9, 13–15
documentation, 4
documents. *See also* pages
    actual size, 21, 46
    adding pages to, 68
    adding snippets to, 277
    applying masters to, 66–67
    creating, 54–55
    custom settings, 53–54
    exporting. *See* exporting items
    importing. *See* importing items
    loading styles from, 248–249
    loading Type tool with, 127
    magnification, 14, 20–22

margins. *See* margins
navigating, 22–24
opening multiple, 14
preflighting, 32–33, 47, 327–329
presets. *See* presets
previewing. *See* previews
printing. *See* printing
renaming, 8, 279
saving, 8, 33
spell checking, 148–151, 153
switching between, 56
turning pages, 22–23
viewing, 31
viewing in Presentation mode, 46
Documents Fonts folder, 142
Download Center, 11
DPS Desktop tools for InDesign, 377
dragging/dropping images, 264
dragging/dropping text, 152
Dreamweaver, 371
drop caps, 37, 174–176, 231
drop shadows, 235, 238, 315, 318
Dynamic Preview, 97

E

eBooks, 356–373. *See also* EPUB files
adding new articles, 366–367
anchored graphics, 360–361
choosing content of, 364–367
cover page, 364–365
exporting, 361–363, 368–371
font embedding, 369
local overrides, 370
manual overrides, 370
metadata, 367, 370
reordering content in, 366
splitting into smaller pieces, 360, 368, 371
table of contents, 363–364
text frames, 361, 366
title pages, 366
edges

detecting, 261, 262, 263
feathering, 315–317
hiding/showing, 144
snapping to guides, 85, 87
Edit Original button, 266
editing
by dragging/dropping, 152
Edit Original button, 266
effects, 320–321
objects, 12
paths, 273
Story Editor, 152, 153–155
educational resources, 4
effects
clearing, 306, 320–321
editing, 320–321
multiple, 318–320
previewing, 316, 318
removing, 306, 320–321
transparency, 314–321
working with, 314–321
Effects panel, 306
em dashes, 188
e-mail, 352
emboss effect, 315
Encapsulated PostScript. *See* EPS
end-of-story character, 167
Enterprise Edition membership, 378
EPS files, 335
.epub extension, 371
EPUB files. *See also* eBooks
commercial, 370
editors for, 371
exporting, 361–363, 368–371
metadata, 367, 370
naming, 368
unique IDs for, 370
viewing component files, 371
EPUB standard, 358
Erase tool, 10
eReader, 358

errors
missing fonts, 141
during preflighting, 32, 33, 198, 199, 327
profiles, 198, 199
spelling, 148–151, 153
Excel, 286
Explorer (Windows), 258, 264
export tags, 361–363
exporting items. *See also* output
alerts, 326
anchored graphics, 361
EPUB files, 361–363, 368–371
flattening and, 334, 335
InDesign files as PDF files, 331–333
interactive PDF files, 353
missing elements and, 260
as snippets, 277
eye icon, 82, 303
Eyedropper tool, 202

F

feathering, 315–317
fields, form, 344–355
files. *See also* documents
accessing in Adobe Bridge, 279–280
accessing in InDesign, 30
accessing original, 279–280
associating with applications, 266
Classroom in a Book, 3
CSF, 194
Defaults, 3–4, 8
EPS, 335
EPUB. *See* EPUB files
exporting. *See* exporting items
.folio, 391–392
hidden, 4
HTML, 360, 363, 387
IDML, 331
Illustrator. *See* Illustrator files
iPad. *See* iPad publications
JPEG, 385, 392
lesson, 3

linked. *See* linked items
missing, 260, 326, 327–328
modified, 258–260
naming/renaming, 8, 279
native, 268–275
packaging, 330–331
PDF. *See* PDF files
Photoshop. *See* Photoshop files
PNG, 392
PostScript, 335, 336, 340
preflighting, 32–33, 47, 327–329
saving, 8, 33
snippets, 277
viewing in Explorer/Finder, 258
XHTML, 371
fills
color, 43, 116–117, 201–203, 244
gradient, 206, 207, 209–210
rows, 290–292
Find/Change dialog box, 145–147
Finder (Mac), 258, 264
finding items, 145–147. *See also search entries*
Fit Page In Window command, 20
Fit Spread In Window command, 20
flattener presets, 334–335, 338–339
flattening transparency, 334–335
floating panels, 9, 12, 17, 18
flowing text. *See* text flows
Folio Builder panel, 377, 391–392
.folio extension, 376
.folio files, 391–392
Folio Overlays panel, 379–380
folios, 376
font library, 142
fonts. *See also* text; typography
acquiring, 142
changing, 141–142, 165–170
copying, 330, 331
downloading to printer, 340
embedded, 369
finding, 141

glyphs, 165–170, 340
included with InDesign, 2
installed, 2
licensing restrictions, 331
Mac OS systems, 2
missing, 32, 140, 141
OpenType, 165–169
packaging and, 330–331
PPD, 340
preflighting and, 327–329
print settings, 338, 340
replacing, 141–142
resources, 142
in Story Editor, 153
styling, 34
text flow and, 130
Typekit Desktop, 330
Windows systems, 2
footers
adding via snippets, 65–66
master pages, 59–61
table, 293–294
Forced Line Break character, 180
Forced Line Break option, 126
form fields, 344–355
formatting. *See also* styles
automating, 37
best practices, 47
characters, 12
finding/changing, 146–147
local, 223, 230, 246
paragraphs, 12, 60
table cells, 239–242, 295–298
tables, 290–293
text, 33–35, 37–40, 146–147
forms, 344–355
fraction characters, 169–170
Frame Break character, 125
frames
adding text to, 33–36
breaks, 131

changing shape of, 104–106, 108–112
contents of, 79
converting to buttons, 347–348, 354
filling proportionally, 98
flowing text into, 125–127
graphics. *See* graphics frames
grids of, 95–96
layers in. *See* layers
locking/unlocking, 109
placeholder. *See* placeholders
placing graphics in, 94, 95–96
placing/flowing text in. *See* text flows
positioning graphics in, 40, 96–98
preexisting, 72
repositioning, 12
reshaping, 104–106, 108–112
resizing, 36
resizing automatically, 133–134
rounded corners, 111–112
shapes, 104–106, 108–112
spacing between, 96, 98–99
text. *See* text frames
threaded. *See* threaded frames
zooming in/out, 86
FX button, 306

G

gamma, 197
gamut, 193, 208
Gap tool, 98–99
global liquid layout rules, 389–390, 393
glow effect, 315
glyphs, 165–170, 340
Google Play Books app, 358
gradient feathering, 315, 316–317
Gradient Swatch tool, 207, 215–217
gradient swatches, 205–207, 215–218
gradients, 205–207
advanced techniques, 215–218
applying to objects, 216–218
blends, 206, 207
color, 205–207, 215–218

described, 205
fills, 206, 207, 209–210
transparency and, 316–317
graphics, 252–281. *See also* graphics frames; images
accessing in Adobe Bridge, 279–280
adding placeholder frames for, 62–63
anchored, 360–361, 367
associating with applications, 266
bitmap. *See* bitmap graphics
captions for, 99–100
centering, 114–115
cropping, 42, 94
display quality, 260–261
dragging/dropping, 264
importing. *See* importing graphics/images
inline, 360
Library items, 360
links to, 255–260, 327–328, 331
moving between layers, 82–84
from other programs, 255
pan-and-zoom, 385
placing and linking, 101–104
placing in frames, 40, 94, 95–96
placing in grid of frames, 95–96
placing on pages, 72–74
placing without frames, 95
positioning, 41
positioning in frames, 96–98
positioning on pages, 72–74
previewing, 40
printing, 339
removing backgrounds, 261–263
resizing, 42, 94, 96–98
resolution, 94, 193, 260
revised, 258–260
RGB, 198, 329, 330, 338
rotating, 112–114
scaling, 42
in scrollable content, 387
selecting with Selection tool, 43
in table cells, 294–295

text, 72–74
updating, 258–260
vector. *See* vector graphics
wrapping text around, 106–108
zooming in/out, 82
graphics frames, 92–106. *See also* frames; graphics
adding text wraps to, 271–273
anchored, 270–273
changing shape of, 104–106, 108–112
compound shapes, 108–109
converting to text frames, 133
creating, 41, 93
image size, 42, 94, 96–98
linking, 101, 102–104
metadata captions, 99–100
parent-child, 102–104
placing, 101–102
placing/positioning images in, 94, 95–96
reshaping, 104–106, 108–112
resizing, 42, 94, 96–98
Graphics layer, 82–84, 92–93
graphics library, 275–278
grayscale images, 303–305
grayscale profiles, 196
grids
adding, 56–57
baseline, 161–164, 173
hiding/showing, 31, 74
leading, 161
grouped items
applying effects to, 306
knockout/blockout groups, 306
objects, 116–117
panels, 17–19
guides
adding to master page, 56–57
bleed, 66, 73
columns, 69
described, 56
dragging from rulers, 57–59
dragging on rulers, 58

fitting to margins, 57
hiding/showing, 31, 74
pasteboard, 58, 62
Smart Guides, 85, 106–107
snapping to, 58, 60, 85, 87
viewing, 31
gutters, 90

H

hand icon, 97
Hand tool, 23–24, 82
hanging indents, 185–186
hanging punctuation, 159, 173–174
header cells, 293–294
headers, adding via snippets, 65–66
headlines, 170–171, 181, 225, 247
Help and Support content, 4
help features, 4, 11, 26
Help file, 193
Help menu, 4, 26
helpx.adobe.com, 4
hidden characters, 31, 91, 182, 270, 360
hidden files, 4
HTML files, 360, 363, 387
HTML tags, 362
hyperlinks
described, 379
iPad publications, 379–380
QR codes, 118
hyphenation settings, 181, 188
hyphens, 188

I

iBooks, 358
IDML files, 331
.IDMS extension, 277
Illustrator, 255–256, 335
Illustrator files
adjusting display quality, 260–261
adjusting transparency, 312–313
earlier versions, 335
importing, 273–275, 312–313

layers and, 273–275
transparency flattener presets, 335
vector graphics and, 255–256
images. *See also* graphics
accessing in Adobe Bridge, 279–280
associating with applications, 266
bitmap. *See* bitmap graphics
cropping, 42, 94
display quality, 260–261
displaying, 25
dragging/dropping, 264
feathering, 315–317
grayscale, 303–305
importing. *See* importing graphics/images
opening, 265–266
panoramas, 384
poster, 380
previews, 274
removing backgrounds, 261–263
resizing, 96–98
resolution, 94, 193, 260
static, 380
thumbnails, 279
vector. *See* vector graphics
zooming in/out, 82
importing graphics/images
with Adobe Bridge, 278–280
alpha channels and, 264–265
identifying images already imported, 256–257
importing/colorizing grayscale images, 303–305
from other programs, 255
with Place command, 72–74, 273–275, 312–313
placing graphics on pages, 72–74
importing items
colors, 218
graphics. *See* importing graphics/images
Illustrator files, 273–275, 312–313
managing links, 256–258
from other programs, 255
Photoshop files, 264–265, 268–269
profiles, 198–199

snippets, 65–66
styles, 248–249
tables, 286
text, 35–36, 72–74, 143–144
indenting paragraphs, 167, 168, 184, 185–186
InDesign CC
defaults, 3–4
described, 1
documentation, 4
fonts included with, 2
help features, 4
installing, 2–3
instructional videos, 4
learning about, 4
obtaining, 2
product home page, 4
resources, 4
support, 4
updates to, 5
InDesign CC product home page, 4
InDesign CS5
accessing files, 30
best practices, 47
customizing, 25
defaults, 8
help features, 26
interface, 25
key features, 28–49
quick tour, 28–49
InDesign Defaults file, 3–4, 8
InDesign Fonts folder, 142
InDesign Help file, 193
InDesign Read Me file, 2
InDesign Support Center, 4
.INDS extension, 277
Ink Manager, 341–342
Insert Pages command, 68
inset values, 91
installation, 2–3
instructions text file, 330
interactive elements, 378–394

interactive PDF files, 353
Interface preferences, 25
iOS Developer Program, 377
iPad, 358, 372
iPad apps, 377
iPad publications, 374–395
    adding interactive elements, 378–394
    creating, 377
    .folio files, 391–392
    hyperlinks in, 379–380
    liquid layout rules, 389–390, 393
    movies, 380–381
    naming, 377
    pan-and-zoom graphics, 385
    panoramas, 384
    previewing, 388
    scrollable text frames, 386–387
    slideshows, 381–383
    web content overlay, 387–388
iPhone, 358
ISBN number, 370
Isolate Blending option, 306

J

JPEG files, 385, 392
jump line page numbers, 135–136
jump lines, 135–136
justified text, 188

K

Keep Lines Together format, 125
Keep With Next format, 125
Keep With Previous format, 125
kerning text, 177–178
key commands, 11, 20–21, 26
keyboard shortcuts
    creating, 225
    document magnification, 14, 20–21
    Go To Page, 23
    Mac OS, 22
    styles, 223
    tools, 11

turning pages, 22–23
Kindle, 358
Knockout Group option, 306
Kobo eReader, 358

L

LAB color, 208
layer comps, 268–269
layer overrides, 269
layered PDF files, 333
layers
background, 84, 269, 303
considerations, 47
content, 81, 82, 84
creating, 84
described, 81
Graphics, 82–84, 92–93
hiding/showing, 81, 82
imported Illustrator files, 273–275
imported Photoshop files, 268–269
locking/unlocking, 83, 93
moving objects between, 83
multiple, 81
multiple objects and, 47
naming, 84
Text, 82, 86, 93
working with, 81–84
Layers panel, 81–84
layouts
alternate, 63–64, 389–390
liquid, 389–390, 393
text wrap and, 271
Leader box, 181, 182
leading, 161
leading grids, 161. *See also* baseline grids
lesson files, 3
lessons, described, 1
letters, spacing, 177–178
Levels settings, 306
libraries, object, 275–278
Library folder (Mac), 3
Library items, as inline graphics, 360

line break characters, 180
line breaks, 86, 126, 178–180
line numbers, 153
line spacing, 161
lines
    hyphenation, 181
    jump, 135–136
    orphan, 125, 126
    ragged, 181
    styles, 231
Link Info section, 257–258, 269
linked items
    graphics files, 255–260, 327–328, 331
    graphics frames, 101, 102–104
    imported files, 256–258
    information about, 257–258, 269
    managing, 256–258
    missing, 254, 276, 326, 327–328
    overset text, 36
    reassigning, 259
    relinking, 259, 276, 328
    revised files, 258–260
    status, 260
    tables, 286
    updated, 331
    updates to, 255, 258–260
    viewing information about, 257–258
Links panel, 255–260, 266, 276
liquid layout rules, 389–390, 393
list boxes, 347, 350
lists
    bulleted, 186
    numbered, 186
    ordered/unordered, 369
    sorting, 350
Live Preflight feature, 32–33, 327, 329
Load Swatches command, 218
loaded graphics icon, 40, 94, 95, 274, 313
loaded snippet icon, 66, 73
loaded text icon, 35, 36, 72, 125, 129, 131
loading styles, 248–249

local formatting, 223, 230, 246
local overrides, 126, 223, 246
lock icon, 93, 109, 303, 307
locked frames, 109

M

Mac OS systems
    aliases, 4
    Application frame, 11
    considerations, 2
    context menus, 24
    creating snippets, 277
    Finder, 258, 264
    fonts, 2
    InDesign Defaults file, 3–4
    keyboard shortcut issues, 22
    Library folder, 3
    maximizing windows, 13
    measurement units, 53
    monitor calibration, 197
    PDF files, 332
    viewing files in Finder, 258
magnification commands, 14, 20–22
Make All Settings The Same icon, 91
margins
    aligning, 161–162, 173–174
    baseline grids, 161–162
    fitting guides to, 57
    hanging punctuation, 173–174
    left/right pages, 61
    Optical Margin Alignment, 173–174
    setting tabs, 182–186
    settings, 53–54
    specifying, 69
master page icons, 55, 58, 64, 66
master page items, 64–65, 74
master page spreads, 56, 58
master pages, 56–67
    adding footers, 59–61
    adding guides, 56–57
    adding pages, 68
    applying to document pages, 66–67

creating, 63–64
creating text frames on, 59–61
deleting pages, 68
described, 55
dragging guides from rulers, 57–59
editing, 60
footers, 59–61
multiple, 63–64
objects on, 56, 65, 66, 74, 75
options for, 61
page numbers, 59–61
parent/child, 63, 64, 65–66
placeholder frames for graphics, 62–63
rearranging pages, 68
renaming, 61
working with, 56–67
measurement units, 53, 54
menu bar, 9
menus
context, 24, 98, 117
customizing, 19, 20, 150
panel, 19
tools with, 10
metadata
captions, 99–100
eBooks, 367, 370
EPUB files, 367, 370
Microsoft Excel, 286
Microsoft Word, 35–36
importing tables from, 286
importing text from, 35–36, 143–144
placing text from, 35–36, 143–144
threading text from, 35–36
Mode buttons, 31
monitors
calibration, 193, 197
characterization, 197
color, 208
performance, 197
profiles, 197
second, 38

view quality, 260–261
viewing color on, 195
movies, iPad publications, 380–381

N

native files, 268–275
nesting styles, 37, 230–235
New Document dialog box, 54, 134, 218
Next button, 383
Next Page Number character, 135
Next Style menu, 225
Nook, 358
Normal mode, 31, 182
notes
inserting, 154
Notes panel, 154
numbered lists, 186
numbers
Arabic numerals, 70–71
fractions, 169–170
line, 153
page. *See* page numbers
Roman numerals, 70

O

Object Layer Options dialog box, 269
object libraries, 275–278
objects, 78–121
aligning, 85, 114–115
anchored, 211
applying gradients to, 216–218
centering, 114–115
changing opacity of, 307–308
color. *See* color
controlling attributes, 12
copying, 136
deselecting, 40, 45
editing, 12
examples of, 43
grouped. *See* grouped items
on layers. *See* layers
managing with libraries, 275–278

on master pages, 56, 65, 66, 74, 75
moving, 12, 44
moving between layers, 83
multistate, 383
naming, 278
placing and linking, 101–104
position, 12
reordering in eBooks, 366
resizing, 12
rotating, 112–114
scaling, 116
in scrollable content, 387
selecting with Direct Selection tool, 88–89, 116, 117
selecting with Selection tool, 82
size, 12, 85
snapping, 85
styles, 37, 45, 47, 235–239
working with, 43–45
wrapping text around, 43
offset press, 196
offset printing, 32
opacity
changing in objects, 307–308
settings, 306
text, 313–314
Open in Device Browser option, 380
Open in Folio option, 380
OpenType fonts, 165–169
Optical Margin Alignment, 173–174
orphans, 125, 126
output. *See also* exporting items
packaging files, 330–331
PDF proofs, 331–333
preflighting files, 32–33, 47, 327–329
overprinting, 196
overrides, local, 126
overset cells, 299
overset text, 32–33, 36, 128–133, 327
oXygen XML Editor, 371

P

Package command, 330–331

packaging files, 330–331
page bleeds, 13
page buttons, 22
page icons, 66–67
page numbers
adding to master pages, 59–61
Arabic numerals, 70–71
changing numbering scheme, 70–71
Current Page Number, 61
jump lines, 135–136
master pages, 59–61
navigating, 14
options for, 55
Roman numerals, 70
sections, 55, 70–71
Page tool, 69
pages. *See also* documents
adding to documents, 68
adding while flowing text, 134
applying masters to, 66–67
custom settings, 53–54
deleting, 68
facing, 53, 80, 134
first, 23
fitting in window, 11, 13, 20, 21, 22, 84
Go To Page command, 23
last, 23
margins. *See* margins
master. *See* master pages
navigating, 14, 22–24, 31
number of, 53
overriding master page items on, 64–65, 74
placing text/graphics on, 72–74
positioning graphics on, 72–74
previewing, 334–335, 336
“pushing” with Hand tool, 23–24
rearranging sequence, 68
recto, 54
size, 53, 69
specifying number of, 53, 54
spreads. *See* spreads

turning, 22–23
verso, 54
viewing, 13–15
zooming in/out, 13
Pages panel, 55, 68
expanding/collapsing, 15–17
turning pages, 22–23
pan-and-zoom graphics, 385
panel menus, 19
panels. *See also* windows; *specific panels*
customizing, 17–19
default, 9
displaying hidden, 15
docked, 9–17
dragging to/from dock, 16
expanding/collapsing, 15–17, 19
floating, 9, 12, 17, 18, 19
grouping/ungrouping, 17–19
hiding/showing, 16, 74
opening/closing, 15, 16
rearranging, 17–19
removing from dock, 17
resetting, 13
resizing, 16, 18
stacking, 18
working with, 15–19, 38
panoramas, 384
Pantone colors, 210, 334
paper color, 202
paragraph attributes, 163
Paragraph Composer, 178–181
Paragraph Formatting Controls, 60
paragraph styles. *See also* styles
applying, 37–38, 86, 226
creating, 224–226
described, 37
local overrides, 126
mapping to export tags, 361–363
nested, 37
nesting character styles in, 230–235
paragraphs

aligning, 172–174
applying rule above, 186–187
density, 179, 180
formatting, 12, 60
indenting, 167, 168, 184, 185–186
line breaks, 86, 126, 178–180
selecting, 86
spacing between, 163–164
styles. *See* paragraph styles
parent masters, 63, 64, 65–66
parent-child graphics frames, 102–104
partners.adobe.com, 5
Paste and Link feature, 101–104
Paste command, 120
pasteboard, 9, 13, 58, 62, 74
pasting
content into table cells, 294–295
styles, 233
text frames, 120
Pathfinder, 109
paths
clipping, 261–263, 267–268, 274
Photoshop files, 265–268
PDF files
considerations, 326
creating PDF proofs, 331–333
exporting InDesign files as, 331–333
form fields, 344–355
including in packages, 331
interactive, 353
layered, 333
presets, 331, 332
transparency flattener presets, 335
pen icon, 303
Pen tool, 104, 105
Pencil tool, 10
photographs. *See* images
Photoshop alpha channels, 265–268
Photoshop files
importing, 264–265, 268–269
paths, 265–268

Place and Link feature, 101–104
Place command
    importing graphics, 72–74, 273–275, 312–313
    importing text, 35–36, 72–74, 144
    placing graphics within frames, 94
    placing graphics without frames, 95
    placing snippets, 65–66
Place dialog box, 35, 40, 127
placeholders, 61–63
    adding for graphics, 62–63
    adding for text, 61–62
    deleting, 64
    form fields, 344–355
    master pages, 62–63
    selecting, 74
Play Books app, 358
Play Full Screen option, 381
PNG files, 392
Polygon Frame tool, 109, 110
Polygon tool, 109–111, 120
polygons, 109–111, 120
poster images, 380
PostScript files, 335, 336, 340
PPD (printer description), 336, 339
PPD fonts, 340
preferences
    Display Performance, 8, 25
    file handling, 277
    Interface, 25
preferences, default, 3–4
preflight errors, 32, 33, 198, 199, 327, 329
Preflight panel, 32–33, 198–199, 327, 329
preflight profiles, 32, 198–199, 329
preflighting, 32–33, 47, 327–329
prerequisites, 2
Presentation mode, 31, 46, 218
presets
    color settings, 194
    custom page settings, 53–54
    described, 53
    flattener, 334–335, 338–339

PDF, 331, 332
print, 338, 339–340
Preview mode, 31, 119
preview thumbnails, 279
previews
color, 208
documents, 31
Dynamic Preview, 97
effects, 316, 318
.folio files, 391–392
graphics, 40
hiding nonprinting elements, 31, 74
images, 274
interactivity, 395
overlays, 388
pages, 334–335, 336
separations, 333–334
spreads, 74
styles, 233, 234, 246
transparency flattener, 334–335
Previous button, 383
Print dialog box, 335, 336–340
printer description (PPD), 336, 339
printers
calibrating, 193
choosing, 336
downloading fonts to, 340
presets, 338, 339–340
printing
color, 198–199, 208
fonts and, 338, 340
graphics, 339
Ink Manager, 341–342
laser/inkjet proofs, 326, 336–340
offset, 32
PDF forms and, 348
requirements for, 198–199
resolution, 331, 334, 335, 338, 339
Printing Instructions dialog box, 330
process colors, 208
production rules. *See* profiles

Professional Edition membership, 378
profiles
default, 32
described, 32
importing, 198–199
preflight, 32, 198–199, 329
using, 32, 198–199
Proof Colors command, 196
proofs, printing, 326, 336–340
.psd files. *See* Photoshop files
pull quotes, 165–166, 173
punctuation, 40, 159, 166, 173

Q

QR (Quick Response) codes, 118
quality checks, 327
quality, display, 260–261
Quick Apply, 229
Quick Response (QR) codes, 118
quotes, pull, 165–166, 173

R

radio buttons, 348–349
ragged lines, 181
rasterization, 361, 364
Read Me file, 2
Rectangle Frame tool, 62–63, 93, 109
Rectangle tool, 62–63
recto pages, 54
reference point, 349
reference point locator, 349
Relative To Page Size option, 361
Relative To Text Flow option, 369
Relink button, 257, 259, 276, 328
Reset Advanced command, 8
resolution
bitmap images and, 97
changing, 30
considerations, 193
for flattening, 334, 335
graphics/images, 94, 193, 260
high, 30

high vs. low, 193
increasing, 8
printing, 331, 334, 335, 338, 339
resources, 4, 142
RGB color, 208, 338
RGB color model, 32
RGB graphics, 198, 329, 330, 338
RGB values, 193
Roman numerals, 70
rotation
graphics, 112–114
objects, 112–114
spreads, 75
rows. *See also* tables
adding/deleting, 287–288
borders, 293
cell style for, 241–242
colors, 243–244
distributing evenly, 290
dragging/dropping, 289
fills, 290–292
header, 293–294
rearranging, 288–289
resizing, 289–290
selecting, 287
separators, 285
tables, 293–294
rulers
dragging guides from, 57–59
dragging guides on, 58
working with tabs, 182, 184, 186
rules, 186–187

S

Sample Buttons And Forms panel, 348–349, 354
satin effect, 315
saving documents, 8, 33
Scale tool, 88
scaling
constraining proportions, 114
graphics, 42
objects, 116

text, 88
screen modes, 336
scrollable text frames, 386–387
Search box, 26
Search menu, 145, 146, 148
search/replace function, 145–147. *See also* finding items
sections, 55, 70–71
Select Content button, 117
Selection tool
cropping with, 42, 94
displaying context menus, 24
selecting frames, 36
selecting objects with, 82
selecting text frames, 36, 45
selecting text in threaded frames, 37
selecting text with, 12, 72–74, 90
switching to/from Direct Selection tool, 89, 105
switching to/from Type tool, 11
working with graphics, 40, 42
zooming with, 22
semi-autoflow feature, 129
separations
color, 208, 333–334, 338, 341–342
previewing, 333–334
shadows, 235, 238, 315, 318
shapes
compound, 108–109
frames, 104–106, 108–112
graphics frames, 104–106, 108–112
polygons, 109–111, 120
rounded corners, 111–112
Shift key, 55, 60, 68, 97, 98
shortcuts. *See also* keyboard shortcuts
tools, 11
Windows, 4
signature fields, 347, 354
Single Edition iPad apps, 377
Single Edition membership, 378
Single-Line Composer, 179–180
slideshows, 381–383
slug area, 31, 336

Slug mode, 31
Smart Dimensions, 85
Smart Guides, 85, 106–107
Smart Spacing, 85
Smart Text Reflow feature, 134
snapping to guides, 58, 60, 85, 87
snippets, 65–66, 277
soft proofing, 196
spacing
    even spacing with Smart Guides, 85
    between frames, 96, 98–99
    between letters, 177–178
    line, 161
    between paragraphs, 163–164
    Smart Spacing, 85
    vertical, 161–164
    between words, 177–178
special characters, 92, 135, 167–170, 188
spelling checker, 148–151, 153
spot colors, 208, 210–211, 339, 341
spreads
    centering, 56, 75
    facing-page, 80, 134
    fitting in window, 20, 23, 57, 60, 74, 87
    margin/column settings, 61
    navigating, 23
    rotating, 75
    viewing, 74–75
stories. *See also* content; text
    aligning text, 161–163, 172–174
    considerations, 47
    described, 37
    editing text, 152, 153–155
    end-of-story character, 167
    Find/Change function, 146–147
    formatting, 37–38
    importing text, 143–144
    jump line page numbers, 135–136
    placing, 125, 131
    spell checking, 148–151
    viewing text, 89

Story Editor, 153–155
“straddle head,” 170–171
Stroke/Fill toggle, 201
strokes
    adding to text, 175
    changing, 44–45
    color, 43, 44–45, 201–203, 213
    dashed, 203–204
    weight, 43, 44–45
styles, 220–251. *See also* formatting
    advantages of, 224
    applying, 37–38, 86, 223, 226
    applying with Quick Apply, 229
    based on other styles, 225, 237
    basic, 223
    best practices, 47
    cells, 239–242, 295–298
    characters. *See* character styles
    considerations, 47
    copying/pasting, 233
    creating, 38–40
    default, 223
    finding/changing formatting, 146–147
    fonts, 32
    globally updating, 246–247
    importing, 248–249
    keyboard shortcuts, 223
    line, 231
    loading from other documents, 248–249
    modifying, 223
    nested, 37, 230–235
    objects, 37, 45, 47, 235–239
    overrides, 223, 246
    overview, 37, 223
    paragraphs. *See* paragraph styles
    previewing, 233, 234, 246
    sharing, 223
    tables, 239, 243–245, 285, 295–298
    text, 33–35, 37–40
    type, 165–170
    updating, 223, 225, 238–239, 246–247

working with, 37
subheads, 163–164, 186
Submit button, 352
subsampling, 338, 339
support, 4
swatches
color, 116–117, 199–201
creating new colors, 200
gradient, 205–207, 215–218
loading, 218
tints, 209–210, 212–214
Swatches panel, 199–218

T

tab leaders, 182–183, 184
tab order, 351
table columns. *See also* columns
adding/deleting, 287–288
distributing evenly, 290
dragging/dropping, 289
rearranging, 288–289
resizing, 289–290
selecting, 287
separators, 285
table of contents, eBooks, 363–364
tables, 282–299
adding graphics to, 294–295
cells. *See* cells
columns. *See* table columns
converting text to, 285
described, 285
Excel, 286
formatting, 290–293
headers/footers, 293–294
importing, 286
links to, 286
rows. *See* rows
selecting text in, 285
styles, 239, 243–245, 285, 295–298
Word, 286
tabs, setting, 182–186
text. *See also* fonts; text frames; typography; words

adding placeholder frames for, 61–62
adding strokes to, 175
adding to frames, 33–36
aligning. *See* aligning text
anchoring graphics in, 360–361
autoflow, 131–132
centering, 61–62, 91–92
changing, 145–146, 147
characters. *See* characters
color, 211–212
converting to outlines, 211
converting to tables, 285
“copy,” 35
copying, 120, 152
deselecting, 37, 38, 40
dragging/dropping, 152
drop caps, 174–176, 231
drop shadows, 235, 238, 315, 318
entering, 143
finding/changing, 145–146, 147
finding/changing formatting, 146–147
fitting to frames, 87
flowing. *See* text flows
formatting. *See* formatting; styles
glyphs, 165–170, 340
graphics, 72–74
gutters, 90
hanging punctuation, 173–174
hidden characters, 31, 91, 182, 270, 360
hyphenation, 181
importing, 35–36, 72–74, 143–144
in InDesign, 33
justified, 188
kerning, 177–178
moving, 12
moving with drag/drop, 152
opacity, 313–314
overset, 32–33, 36, 128–133, 327
paragraphs. *See* paragraphs
placing, 72–74
placing into text frames, 35–36, 143–144

pull quotes, 173
replacing, 145–146, 147
repositioning, 12
scaling, 88
selecting, 12, 37, 38, 40, 72, 90
size, 34
small caps, 146
spacing. *See* spacing
special characters, 92, 135, 167–170, 188
spell checking, 148–151, 153
stories. *See* stories
styles. *See* formatting; styles
threading. *See* threaded frames; threading text
tracking, 126–127, 177–178
tracking changes to, 154–155
transparency, 313–314
typing/styling, 33–35, 37–40
vertical spacing, 161–164
words. *See* words
wrapping around graphics, 106–108
wrapping around objects, 43
text fields, 347–348
text flows, 122–137. *See also* threaded frames
adding pages during, 134
adjusting within frames, 131
automatic, 131–132
into existing frames, 35–36, 125–127
fonts and, 130
manual, 127–129
with semi-autoflow, 129
Smart Text Reflow feature, 134
text frames, 86–88. *See also* frames
adding text to, 33–36
adjusting text inset, 91–92
changing dimensions, 12
changing number of columns, 90
constraining, 60
converting graphics frames to, 133
copying/pasting, 120
creating, 33, 35–36, 86–88
creating columns with, 127

creating on master page, 59–61
creating with Type tool, 59–61, 62, 86
described, 33
deselecting, 60
eBooks, 361, 366
empty, 132
fitting text to, 87
flowing text in. *See* text flows
importing text into, 35–36, 72–74
options for, 36, 90–91, 91–92
placing text into, 35–36, 143–144
removing, 132
reshaping, 88–89, 104–106, 108–112
resizing, 36, 86–88
resizing automatically, 133–134
scrollable, 386–387
selecting, 36, 45
threaded. *See* threaded frames
vertically aligning text in, 91–92
Text layer, 82, 86, 93
text threads. *See* threaded frames
text wraps
graphics frames, 271–273
objects, 43
TextWrangler, 371
threaded frames. *See also* text flows
adding pages, 134
best practices, 47
considerations, 47
creating automatically, 132–133
creating columns via, 127
creating within columns, 35–36
described, 35
pre-threading text frames, 132
process for, 35–36
selecting text in, 37
threading text
automatically, 132–133
manually, 127–129
process for, 35–36
thumbnails, 279

tints, 209–210, 212–214
titles, eBooks, 366
tool tips, 11
tools, 9–11
Tools panel, 9–11
Track Changes panel, 154
tracking, 126–127, 177–178
tracking text changes, 154–155
Transform panel, 58, 59
transparency, 300–323
    applying to bitmap images, 311
    Background layers and, 303
    effects, 314–321
    flattening, 334–335
    gradients and, 316–317
    Illustrator files, 312–313
    settings, 305–309
    text, 313–314
    vector images, 309–310
transparent backgrounds, 264, 274
Trash Can button, 306
tutorials, 4
TV, Adobe, 4
Type menu, 167
type styles, 165–170. *See also* fonts
Type tool
    adding anchored graphics, 360
    adding text with, 34, 143
    creating text frames, 59–61, 62, 86
    displaying context menu, 24
    displaying Hand tool, 23
    drawing frames with, 60
    loading with multiple files, 127
    placing content into table cells, 294–295
    placing text into text frames, 143–144
    selecting rows/columns, 287
    selecting text with, 12, 37
    switching to/from Selection tool, 11
Typekit Desktop fonts, 330
Typekit font library, 142
typesetters, 40

typography, 158–189. *See also* fonts; text
changing type style, 165–170
drop caps, 174–176, 231
glyphs, 165–170, 340
hanging punctuation, 173–174
Paragraph Composer, 178–181
Single-Line Composer, 179–180
special characters, 92, 135, 167–170, 188
vertical spacing, 161–164

U

Undo feature, 147, 151, 201, 289, 320
updates, InDesign, 5
URLs, 118, 387, 388

V

vector graphics
adding transparency to, 309–310
vs. bitmap graphics, 255–256
verso pages, 54
videos
instructional, 4
iPad publications, 380–381
poster images and, 380
view commands, 20–21
view modes, 31
view quality, 260–261
View Threshold menu, 162

W

web browsers
Adobe Creative Cloud, 4
Adobe TV, 4
digital publications and, 380
web content overlay, 387–388
web pages, 380
websites
Adobe Authorized Training Centers, 5
Adobe certification program, 5
InDesign Help and Support, 4
InDesign product home page, 5
InDesign training resources, 4

windows. *See also* panels
consolidating, 15
document, 9, 13–15
fitting pages in, 11, 13, 20, 21, 22, 84
fitting spreads in, 87
managing, 14
repositioning, 15
resizing, 15
Windows systems
AppData folder, 3
considerations, 2
context menus, 24
creating snippets, 277
Explorer, 258, 264
fonts, 2
InDesign Defaults file, 3–4
maximizing windows, 13
measurement units, 53
monitor calibration, 197
PDF files, 332
shortcuts, 4
viewing files in Explorer, 258
Word. *See* Microsoft Word
word processors, 35
words. *See also* text
checking spelling of, 148–151, 153
copying, 152
formatting, 38, 39
hypenating, 181
selecting, 38, 40
spacing, 177–178
work environment, 195
workflows, 194, 199, 338
workspaces, 6–27
advanced, 20
components, 7, 8–15
creating, 20
customizing, 8, 20
default, 20
managing, 18
resetting, 8

selecting, 18
types of, 20

X

XHTML files, 371

Z

zoom controls, 13, 20–22
Zoom Level box, 20, 21
Zoom Level menu, 21, 23
Zoom tool, 14, 21–22, 82, 86
Zoom tool icon, 22
zooming in/out, 14, 20–22, 82, 86