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1

The Working Environment

This chapter takes a look at the working environment and gets you started using Adobe InDesign. It covers setting up a new document and introduces tool and panel conventions along with other useful techniques that will help make you accurate and productive as you start to use the software.

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The author

Robert Shufflebotham, a qualified teacher, has over 21 years of software training skill and experience.

He has trained and written In Easy Steps guides on InDesign since version 1 of the software. During this time he has developed a unique understanding of what it takes to get the best out of InDesign from the start.

Benefit from his considerable and varied experience distilled in the pages of this book as he guides you through the essential functionality that puts you on a course to successful mastery of the software.

Version Alerts

Watch out for version alerts in panels like this one. Where significant differences exist between different versions of the software they are highlighted and explained in these green panels.

Learning InDesign

This book offers a unique approach to learning InDesign. Its prime purpose is to focus on the fundamental principles and core processes, common to all versions, that you need to know as you start using InDesign in order to become a confident, proficient and productive user. Master these fundamentals and you can progress to exploit the full creative potential of a software application that is undoubtedly one of the most powerful, creative tools available.

Because of this clear focus and an approach that breaks down the software into easily digested learning sequences you can use this book to comfortably learn to use all recent versions of the software.

Importantly, *InDesign in easy steps* does not seek to cover every single function in InDesign. Such attempts can lead to information overload in the new user – all too often it's not quite clear what is essential and what is of marginal use, and as a result, the new user cannot develop a clear, logical learning strategy for understanding and then mastering new software.

Screenshots and versions

The screenshots used to illustrate the main steps on each page are taken from version CS5 of the software, from both the PC and Mac environments. In a high proportion of instances, the screenshots used are consistent in CS3, CS4 and CS5. Where necessary, screenshots from previous versions are included to illustrate changes and variations between versions.

Step by step instructions

Since the release of InDesign CS, the core functionality of InDesign has remained largely consistent and, based on considerable past experience, is likely to remain so for the next release of the software.

You can use this book with confidence to learn all recent versions of InDesign. Only one chapter – Chapter 17, Interactive – covers features available only in CS5.

Throughout the book the step by step instructions apply to all recent versions of the software, unless indicated otherwise, with explanatory notes, in either the text or in the version alert panels in the sidebar, where there are variations between versions of the software.

Enjoy learning.

The Tool Panel CS3 – CS5

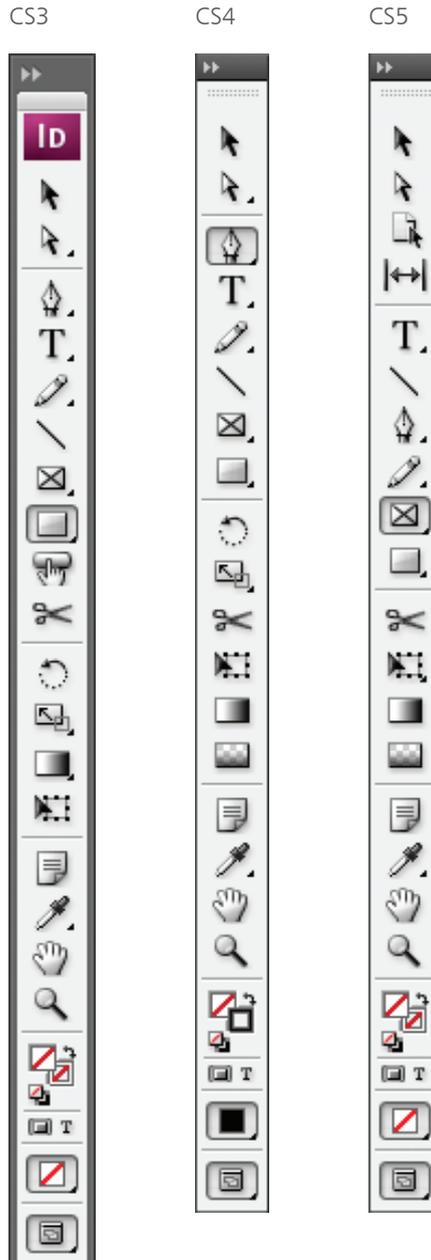
To get a feel for how interface detail and functionality has evolved in InDesign versions from CS3 to CS5, take a look at the screen shots for each version of the Tool panel.

You'll see that some changes are largely cosmetic. For example, in CS3 the look and feel of the Tool panel changed from earlier versions and the toggle appearance button () at the top of the panel was introduced, allowing you to easily change its appearance from single column to double column.

Sometimes new tools get added with a new version. For example, the Page tool and the Gap tool are new in CS5.

Occasionally, a tool is removed, for example, the Button tool introduced in version CS2 is no longer available in CS4 as different commands were introduced for creating multimedia style buttons.

But, even a fairly cursory look at the screenshots should convince you that there is considerable continuity in the toolset on offer across versions.



The Note tool appears for the first time in InDesign CS3.

The Gradient Feather tool makes its appearance in CS4 (see page 214 for further information) although you can create identical results using the Effects panel in CS3.

The Button tool disappears in CS4 making way for other techniques for creating interactive buttons.

The Position tool no longer appears in CS5 as the Content Grabber (see page 91) provides the same controls.

The Page tool (see page 30) and the Gap tool (see page 48) are introduced in InDesign CS5.

The Rotate, Scale and Shear tools become part of the Free Transform tool group in CS5.

Hot tip

Choose Web from the Intent pop-up menu to set a page size of 800x600 pixels and to convert measurement settings to pixels. This can provide a quick option for starting a SWF for the web or a PDF presentation. Choose other standard pixel dimensions from the Page Size pop-up.

You cannot change Intent settings after you OK the New Document dialog box.

Hot tip

Click the More Options button to reveal controls for setting additional Bleed and Slug guides. These are non-printing guides: content placed in these areas should not appear when the page is trimmed to its final size. Enter Bleed values to define the size of the bleed area for any objects that cross the page edge and 'bleed' off the page. Enter values for Slug to define an area outside the page area where instructions to the printer or other information relating to the document can appear:

Bleed and Slug				
	Top	Bottom	Inside	Outside
Bleed:	0 in	0 in	0 in	0 in
Slug:	0 in	0 in	0 in	0 in

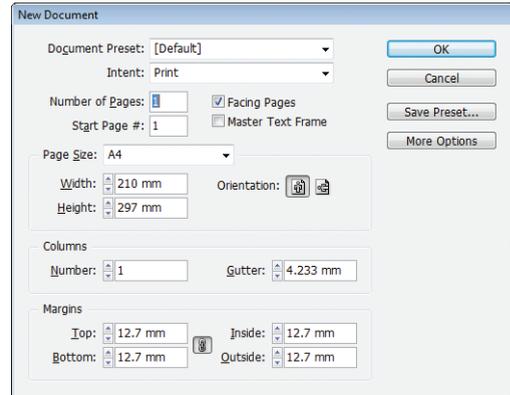
The Intent pop-up menu and the Start Page # option are new features introduced in InDesign CS5.

Document Setup

Launch Adobe InDesign as you would any other application (from the Start menu – Windows, or from the Applications folder or Dock – Mac). When the InDesign splash screen and workspace appear you can create a new document.

Size and Orientation

- 1 To create a new document, choose File>New. The New Document dialog box appears. Use the Page Size drop-down list to choose a standard page size, if appropriate.

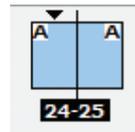


- 2 Select Master Text Frame to automatically create a text frame on the A-master that fits to the margins and matches the number of columns and gutter specified in the dialog box (see Chapter 10 for information in Master Pages).

- 3 Enter the number of pages you want in the document. If you are unsure of the number of pages you need, you can always add or delete pages when you are working in the document.

- 4 Choose the Facing Pages option to create a publication such as a magazine, brochure or book which will consist of double-page spreads. If you choose Facing Pages, Left and Right in the Margins area change to Inside and Outside, allowing you to set a wider inside margin to accommodate any binding edge in your document.

- 5 Use the Start Page # entry field if you want to start a document with a left hand page (in which case you enter an even number), or if you want to create a section as you set up a document. For example, if you enter an even number, InDesign creates a left hand page to begin the document, instead of the default right hand page. If you subsequently set up automatic page numbering (see page 145 for further details) the pages start numbering from the value you enter in this field.



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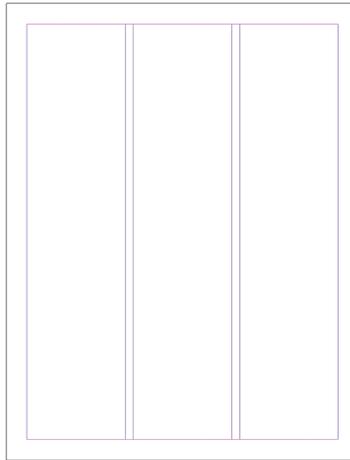
- 6 To create a non-standard page size, make sure the Width entry field is highlighted, and then enter the page width you require. Then, do the same with the Height entry field.
- 7 Click the Landscape icon if you want to create a landscape page orientation. Portrait is selected by default.

Margin Guides

Set margin guides to define the main text area of your document. Margin guides are non-printing and appear as magenta lines on the screen. Margin guides are only guides – objects can be placed across margin guides or completely outside the margin guides.

- 1 Either enter values for Top, Bottom, Left/Right, Inside/Outside.
- 2 Or click the “Make all settings the same” button () to make it active, and then enter a value in one of the Margin entry fields. Press the Tab key to make all values the same as the first value you enter.

Orientation:  



Column Guides

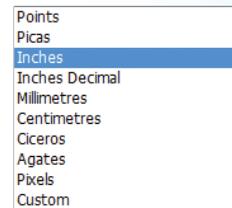
Column guides are non-printing and appear on screen as purple lines. They serve as a grid for constructing a publication. You are not constrained to working within the columns – all InDesign objects can cross column guides as necessary to create the page design you require.

- 1 Enter the number of columns you want. Specify a Gutter – the space between columns. InDesign calculates the widths of columns based on the overall width of the page, the number of columns, and the values entered for margins and gutters.
- 2 When working in a document, to change margin and column settings for the currently selected master page, spread or page, choose Layout>Margins and Columns. Enter new values as required. OK the dialog box.

Hot tip



To set the default measurement system for all new documents, launch InDesign, but do not start a new document. Choose Edit>Preferences>Units & Increments (Windows), or InDesign>Preferences>Units & Increments (Mac). Change the Horizontal and Vertical Ruler Units pop-up menu to the unit of measurement you want to use:



Hot tip



In any dialog box, press the Tab key on your keyboard to move the highlight from entry field to entry field. Once the value in an entry field is highlighted, simply enter a new value to replace the original value.

Don't forget



Command (often referred to as "Apple" on the Mac) and Ctrl (Windows), and Alt/option (Mac) and Alt (Windows) are used identically as modifier keys. Shift is standard on both platforms.

This book uses Alt, with an uppercase "A", to denote both the Macintosh and Windows keys of that name.

The Working Environment

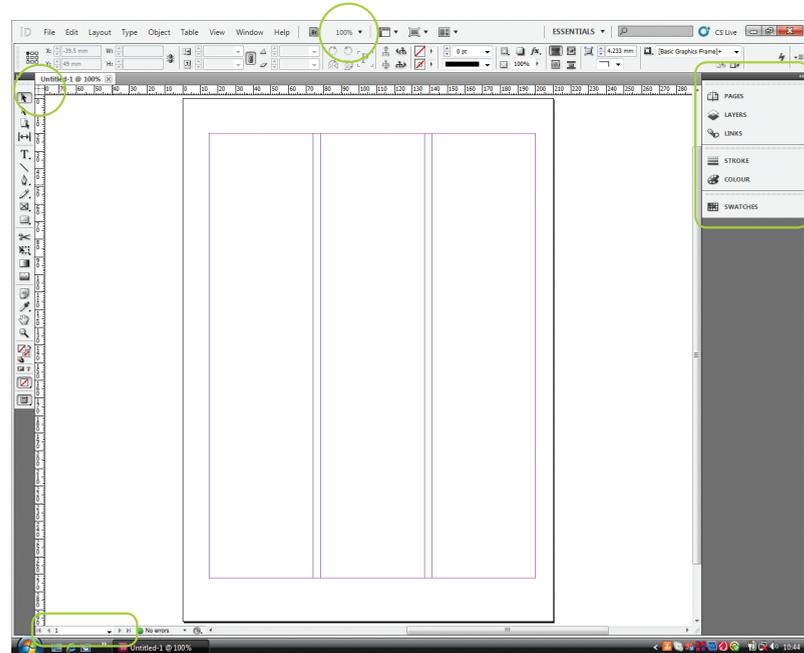
In common with Adobe Photoshop and Adobe Illustrator, Adobe InDesign is virtually identical on both the Windows and Macintosh platforms, making it easy to work in both environments without the need for extensive retraining.

This book uses a mixture of Windows and Macintosh screenshots, and the instructions given apply equally to both platforms. The identical functionality of InDesign on both platforms can be seen from an examination of the application windows on these pages, and from a comparison of the screenshots of various Windows and Macintosh dialog boxes and panels throughout the book.

Drag the Zero Point crosshairs onto the page to reset the zero point

Use the Zoom level pop-up menu to select a zoom level, or enter a value in the entry box then press Enter/Return to change the zoom level

The Panel dock runs down the right edge of the InDesign window



The Page Controls allow you to move to the Next/Previous, First/Last pages in a multi-page document, or any page you specify in the Page Number field

Don't forget

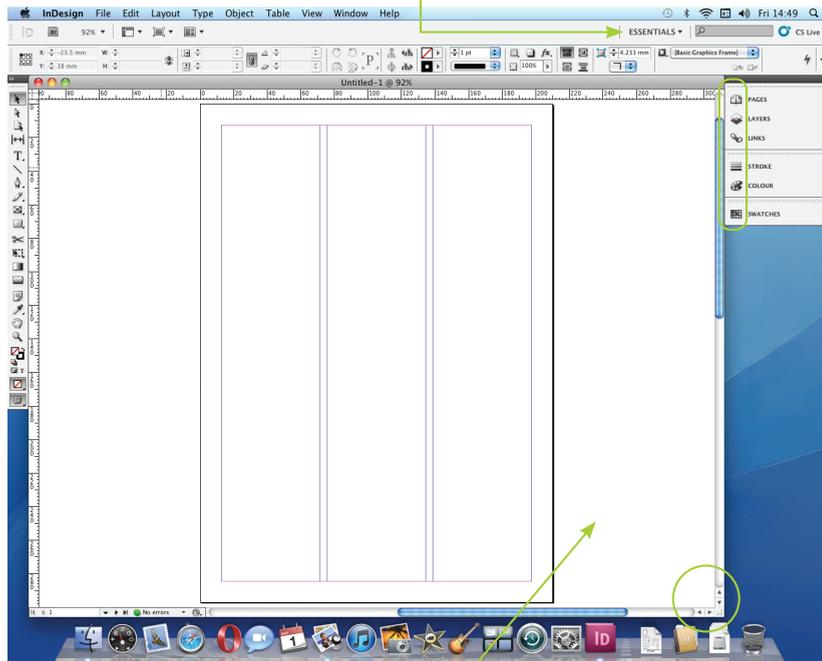


Windows users can use the right mouse button to access context-sensitive menus; Mac users can hold down the control key and press their single mouse button.

...cont'd

InDesign CS4 and CS5 have a Workspace Switcher pop-up menu that includes preset arrangements of panels suitable for particular kinds of work

Click on a panel icon in the Panel dock to expand the panel, along with other panels in the same panel group

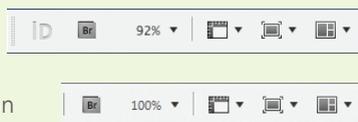


The Pasteboard area exists all around the document page or spread. Objects you place on the Pasteboard are saved with the document but do not print

Click the Scroll Arrows to scroll the page up, down, left or right in increments. You can drag the Scroll Box to move the page a custom amount. Alternatively, click either side of the Scroll Box to move the window in half-screen increments

Application Bar: CS4, CS5

InDesign CS4 and CS5 have an Application bar with a button to launch Adobe Bridge and a convenient set of pop-up menus: Zoom Level, View Options, Screen Mode and Arrange Documents.



Don't forget



To avoid any confusion, it is good practice to delete unnecessary items from the pasteboard before you send your document to a commercial printer.

In InDesign CS5, click the CS Live button, provided you have an internet connection, to sign up for Adobe Online services which include file sharing, web conferencing and online review facilities.

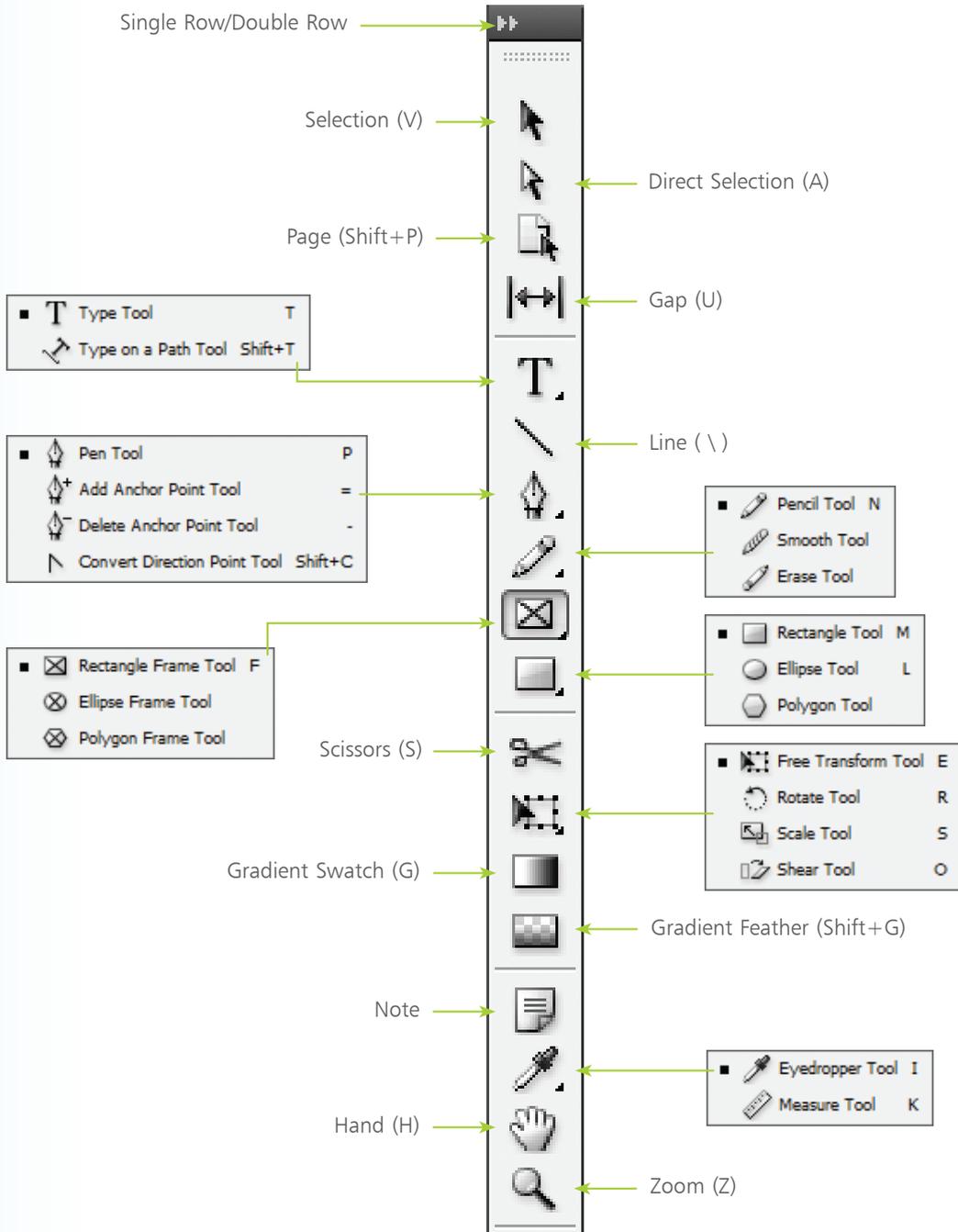
Hot tip



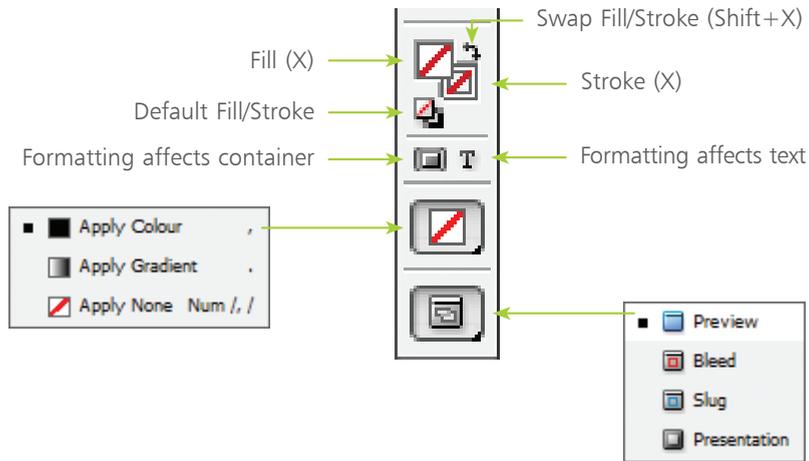
Each time you launch InDesign the Welcome screen appears. Click one of the listed links, or click the Close button to begin working in InDesign. To prevent the Welcome screen appearing every time you launch InDesign, deselect the Show this dialog at startup checkbox.

The Tool Panel CS5

Use the following techniques to choose tools and to work quickly and efficiently as you build page layouts in Adobe InDesign.



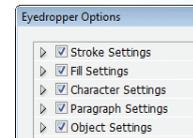
...cont'd



Hot tip



Double-click the Eyedropper tool to access the Eyedropper Options dialog box, where you can create settings to control exactly which attributes the Eyedropper copies:



Tool Panel Techniques

- 1 Most of the time you will have the Tool panel visible as you build documents. If you accidentally close it, choose **Window>Tools** to display the Tool panel.
- 2 To choose a tool, click on it in the Tool panel. The tool is highlighted and when you move your cursor back into the InDesign window, the cursor changes to indicate the tool you selected.
- 3 A small, black triangle in the bottom-right corner of a tool icon indicates that there are additional tools available in the tool group. To access a hidden tool, press and hold the tool currently showing in the Tool panel; this will show the tool group pop-up. Slide your cursor onto the tool you want to select, and then release. The tool you select is displayed in the Tool panel as the default tool in that group until you choose another tool from the group. 
- 4 Provided that you do not have the text insertion point located in text, press the **Tab** key to hide all visible panels including the Tool panel. Press **Tab** again to show all previously visible panels. Hold down **Shift** and press the **Tab** key to hide all panels except the Tool panel.
- 5 Rest your cursor on a tool in the Tool panel for a few seconds to display the tool tip label. This tells you the name of the tool and, in brackets, its keyboard shortcut. 

Hot tip



If you find the tool tip labels distracting, you can turn them off: choose **Edit>Preferences>General (Windows)** or **InDesign>Preferences>General (Mac)**; then select **None** from the **Tool Tips** menu.

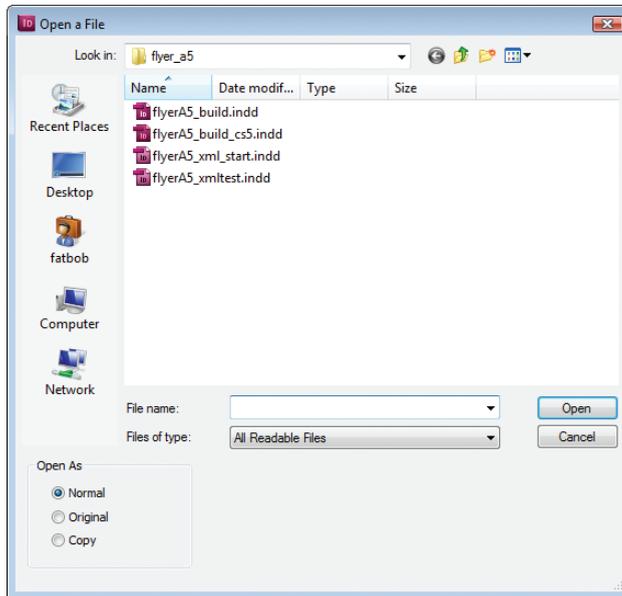
Hot tip

InDesign documents have the extension .indd. InDesign templates have the extension .indt.

Opening Documents

As well as creating new InDesign documents, you will often need to open existing documents. If you open an InDesign document created by an earlier version of the software, InDesign converts the document to the version you are using and adds “[Converted]” to the document tab. When you save a converted file you are prompted to perform a Save As to save an updated copy of the file using the newer version of the software.

- 1 To open an existing document, choose File>Open.
- 2 Use standard Windows/Mac techniques to navigate to the file you want to open.



- 3 Click the file name to select it. Click the Open button.
- 4 In the Open a File dialog box, click the Copy radio button to open a copy of the file – the file opens as an untitled document.
- 5 When you want to edit an InDesign template, in the Open a File dialog box, click on the template file name and then select the Original radio button before you click Open.

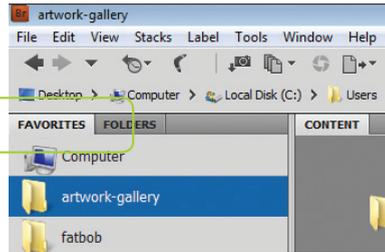
Bridge

Adobe Bridge is a file management application providing a powerful, flexible set of controls which allow you to locate, track, view and manage all your digital assets created using Adobe Creative Suite applications as well as files created by other software applications. Click the Go to Bridge button in the Menu/Application bar to launch Adobe Bridge.

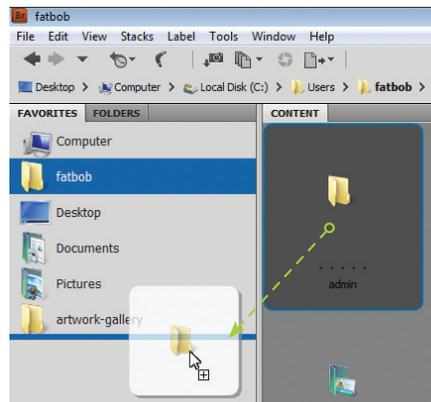


Favorites view

You can create your own favorites folders to provide quick access to folders you use on a regular basis.



- 1 To create a new favorites folder, click the Favorites tab, then click the Computer icon. Navigate to the folder in the main Content pane by double-clicking folder icons. Position your cursor on the folder, then drag it into the Favorites pane, below the divider bar.



- 2 To remove a folder from the Favorites pane sidebar, position your cursor on the folder then right-click (Windows) or ctrl+click (Mac). Select Remove from Favorites from the context menu.

Folders View

In Folders view you can view, manage, sort and open files. You can also create new folders and move, rename, delete and rank files.

- 1 Click the Folders tab. Use the Folders pane to navigate to specific folders on your system using standard Windows/Macintosh techniques. You can also use the drop down list above the Folders tab to navigate to recently used folders.

Hot tip



You can launch Bridge as a standalone application – from the Start>Programs menu in Windows, or from the Applications folder on the Mac.

Hot tip



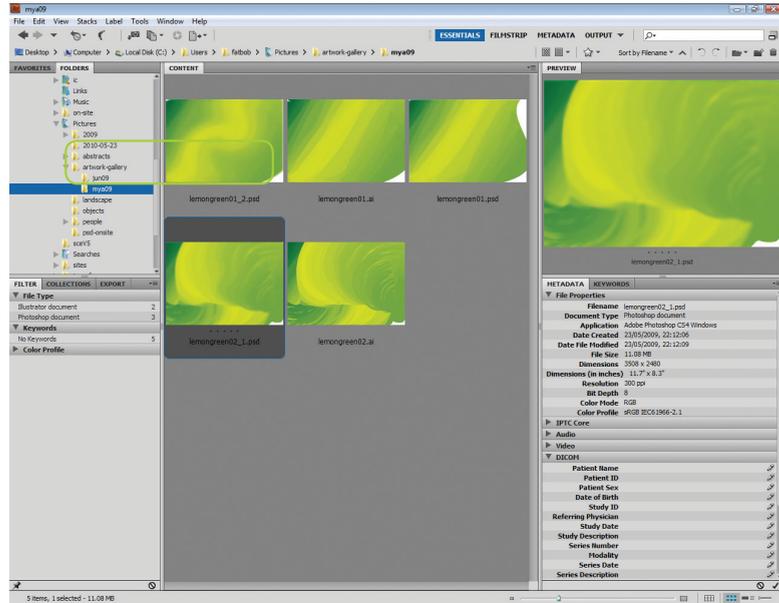
You can also create a Favorites folder from the Folders tab. Navigate to a folder, position your cursor on the folder then right-click (Windows) or ctrl+click (Mac). Select Add to Favorites from the context menu.

Hot tip



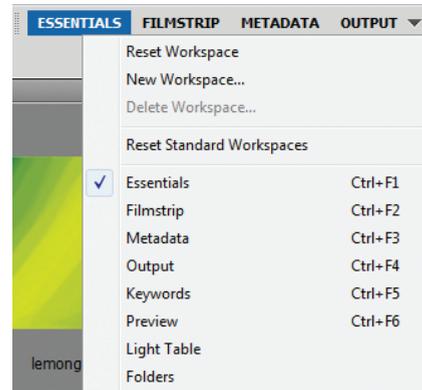
To move a file, position your cursor on the file thumbnail, then drag it to a different folder in the Folder panel of the Bridge window. To copy a file to a new location, hold down Ctrl (PC) or Alt/option (Mac), then drag it to a different folder.

...cont'd



2 Thumbnail previews of the contents of the selected folder appear in the Contents pane in the middle of the window.

3 Essentials is the default Bridge workspace. Use the Workspace pop-up menu or click on one of the visible workspace options to change the arrangement of panes in Bridge to suit your needs.



4 Click once on a file in the Content pane to display a larger preview in the Preview pane.

Position your cursor on any of the borders of the Preview pane, then drag to resize the pane as required.

5 To open a file from the content area, click on a thumbnail to select it, and then press Enter/Return. You can also double-click on a thumbnail.

Hot tip



Drag the Thumbnail Size slider at the bottom of the window, to increase or decrease the size of the thumbnail previews in the Contents pane.



...cont'd

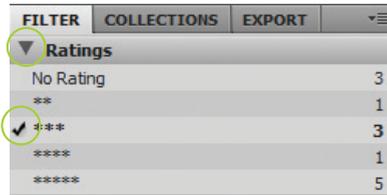
- 6 To delete a file, click on the thumbnail to select it, and either click the Wastebasket icon in the Bridge Toolbar, or drag the thumbnail onto the Wastebasket. Alternatively, use Ctrl/Command+Delete.



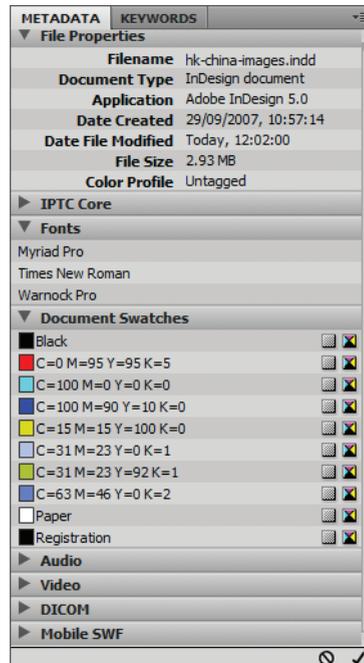
- 7 To rank a thumbnail, first select it; then click one of the dots below the thumbnail image to award stars. You can add up to five stars. To remove stars, click one of the existing stars. Click to the left of the stars to remove all stars.



- 8 To display only thumbnails with a specific star rating, click the Filter tab to make it active, then click the Ratings expand triangle. Click to the left of a star rating to display files with that rating.



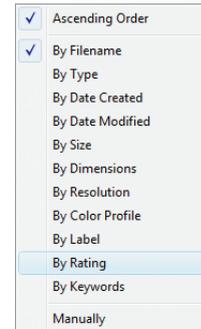
- 9 Click the Metadata or Keywords tab to view additional labeling information saved with a file. You can also use options from the panel menu (☰) for each tab to add and edit metadata and keyword information for the file. For selected InDesign files there are panes for Fonts and color swatches used in the document. Use the Expand/Collapse triangle (▾) to display/hide information for each category.



Hot tip



Choose an option from the View>Sort sub-menu to control the way image thumbnails are ordered in the Preview pane:



Hot tip



To display thumbnails in the content area according to their rank, choose View>Sort>By Rating. Or, use the Sort by pop-up menu in the Filter pane.



Hot tip

Control the size of the Mini Bridge window by placing your cursor on the left, right or bottom edge of the floating panel. Drag when you see the bidirectional resize arrow. By changing the size of the panel you can arrange the Content Pod to the right of the Navigator Pod or below it.

**Hot tip**

Use the pop-up menus in the Content Bar to select, sort and filter the contents of the Content Pod as you can in Adobe Bridge (see pages 17–19):

**Hot tip**

Click once on an image or pdf thumbnail to select it, then press the Spacebar to show a full screen preview of the file. Press the Spacebar again to hide the preview.

Mini Bridge

Mini Bridge provides a similar range of functionality to Adobe Bridge, but from within the InDesign working environment. Choose **Window>Mini Bridge** to show the panel.

- 1 Click the Browse Files button to begin using Mini Bridge. Clicking the Browse Files button also launches Bridge in the background as Mini Bridge operations rely on Bridge to carry out tasks.
- 2 Use the Panel View pop-up menu to control the visibility of the Path Bar and the Navigation and Preview Pods.
- 3 Use the Path Bar to navigate to folders containing files that you want to view in the panel. You can also use the Navigation Pod to move to folders on your system.
- 4 Drag the Thumbnail Size slider, at the bottom of the panel, to control the size of thumbnail previews in the Content Pod.
- 5 Click the View button at the bottom of the panel to specify the arrangement and appearance of file thumbnails.

