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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 Home Screen

Click the **Learn** button to show a list of web-based tutorials from Adobe.

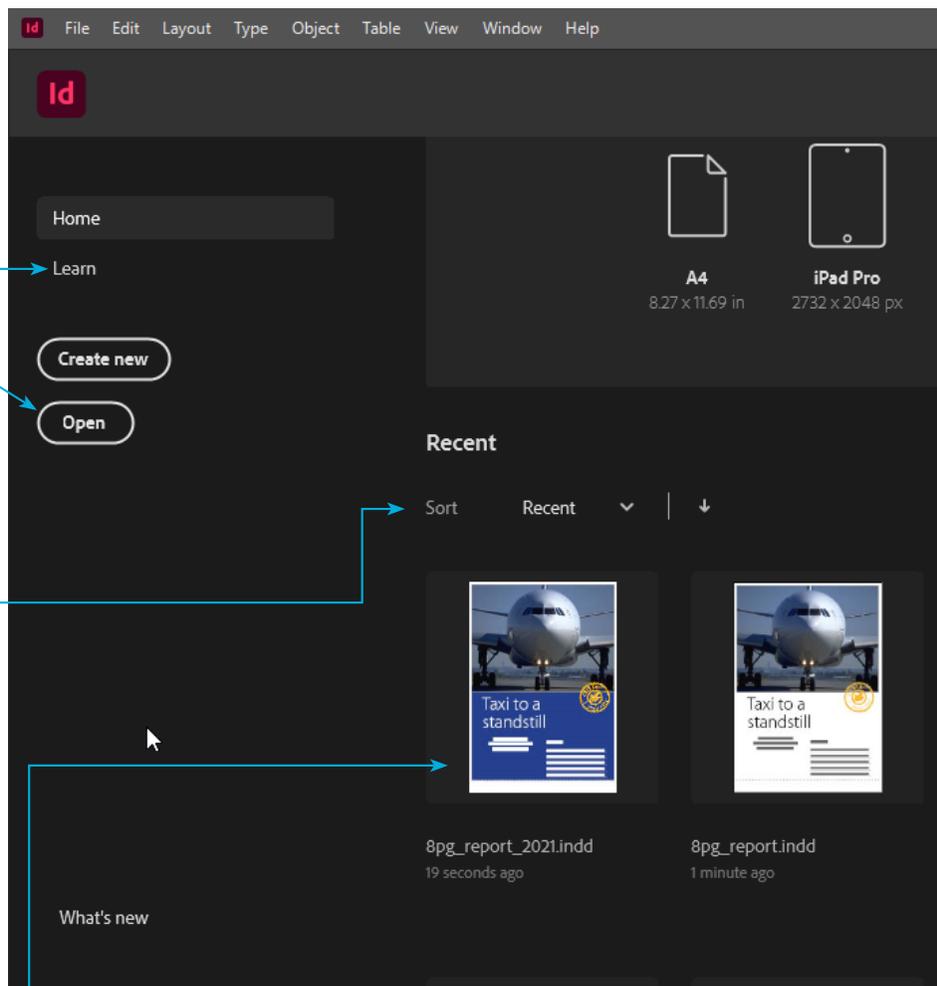
Click the **Create new** button to go to the New Document dialog box. Click the **Open** button to open an existing InDesign document using the standard Windows/Mac Open dialog box.

Use the **Sort** pop-up menu to control the ordering of the thumbnails. **Recent** is the default: your most recently opened documents appear at the start of the list. You can also sort by Name, Size and Kind.

The **Sort Order** button () is a toggle to reverse the order in which thumbnails appear – for example, from largest file size to smallest; or smallest to largest.

Thumbnails of the most recent InDesign documents you've worked on appear in the **Recent** pane, giving you quick visual access to projects on which you are currently working.

Click on a thumbnail to open the InDesign document.

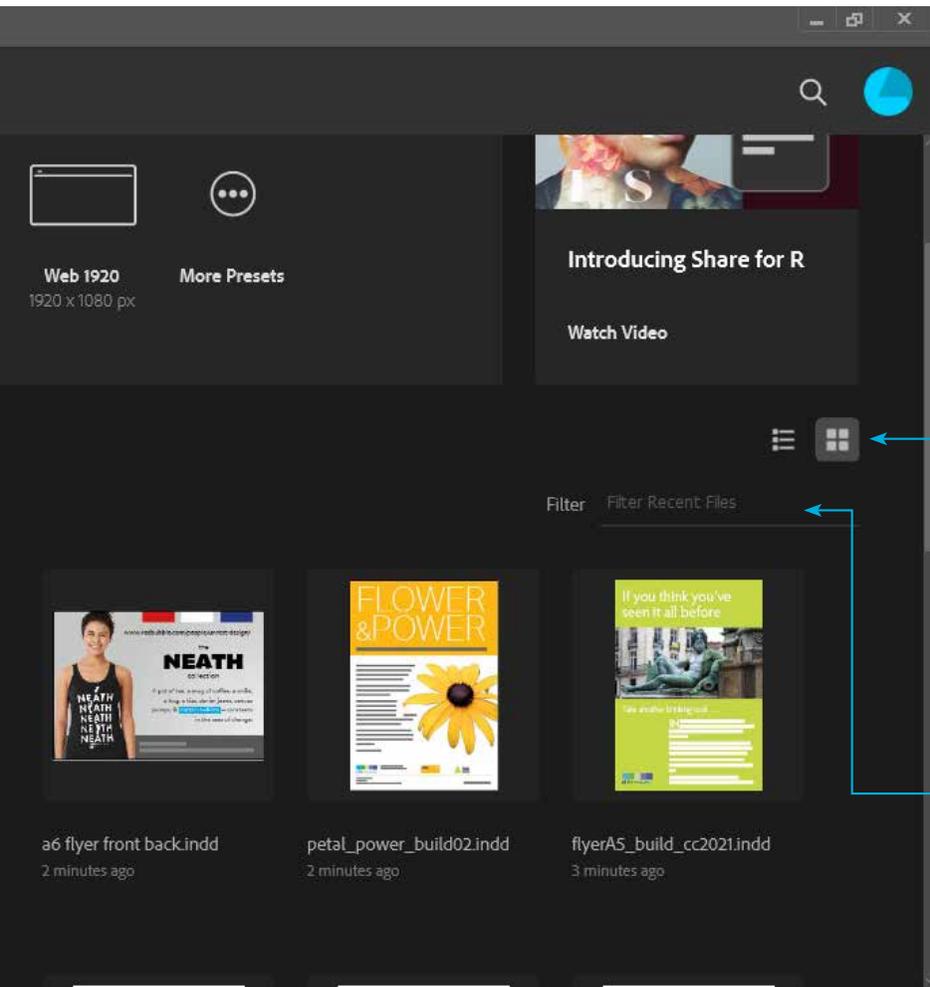


The author

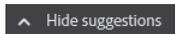
Robert Shufflebotham draws on over 28 years' experience of working in top-flight publishing, design and marketing environments. He is a qualified teacher.

He has trained and written books on InDesign since version 1. 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 course to successfully master the software.



Click the **Hide suggestions** button (in the top-right corner of the Home screen) to hide the suggested preset document sizes – A4/Letter, iPad Pro, Web – and the New Features videos pane:



Hiding suggestions can free up more space on your screen to show more InDesign document thumbnails.

Use the **List/Grid** buttons to control the appearance of the thumbnails. Grid view provides additional information such as file size and kind.

Use the **Filter** entry box to quickly locate InDesign documents by name.

Scroll down to see all available thumbnails.



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 for a 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 the new software.

Selecting an Intent

When you create a new document, one of the first choices you need to make is to select your Intent.

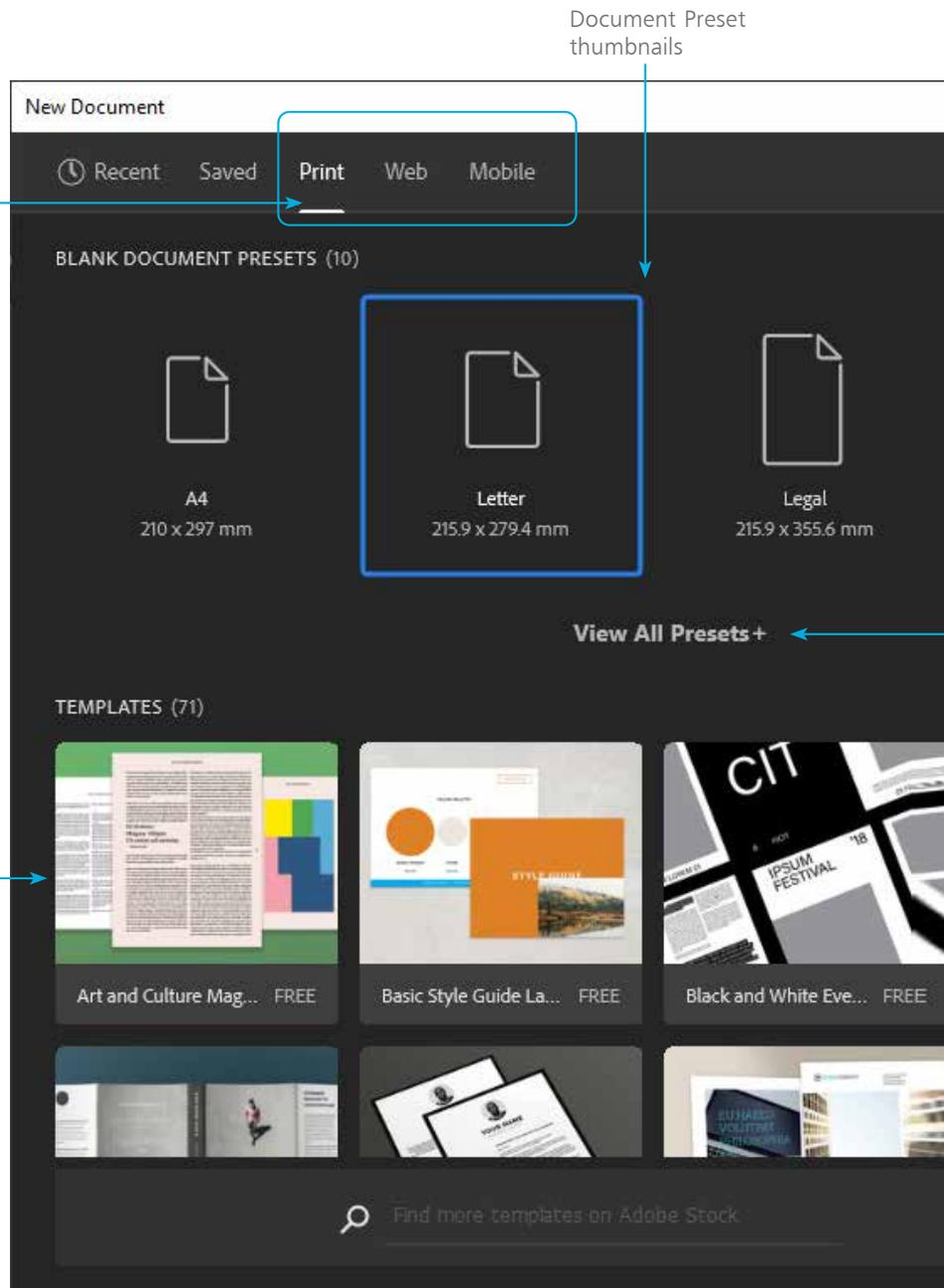
Select an Intent according to your primary final output requirements: is your InDesign document going to be printed or is it going to be used online or displayed on a smartphone?

If you select **Print**, the default color mode is set to **CMYK** (see pages 106-110 for information on color modes).

The measurement system will typically be inches in the US, or millimeters/centimeters in Europe and the UK. The Blank Document Presets are standard print-size templates designed for printing.

Select **Web** or **Mobile** to see standard Blank Document screen sizes in pixels, with RGB set as the default color mode. Notice in the Preset Details panel on the right that the **Units** setting changes automatically to **Pixels** if you select **Web** or **Mobile**.

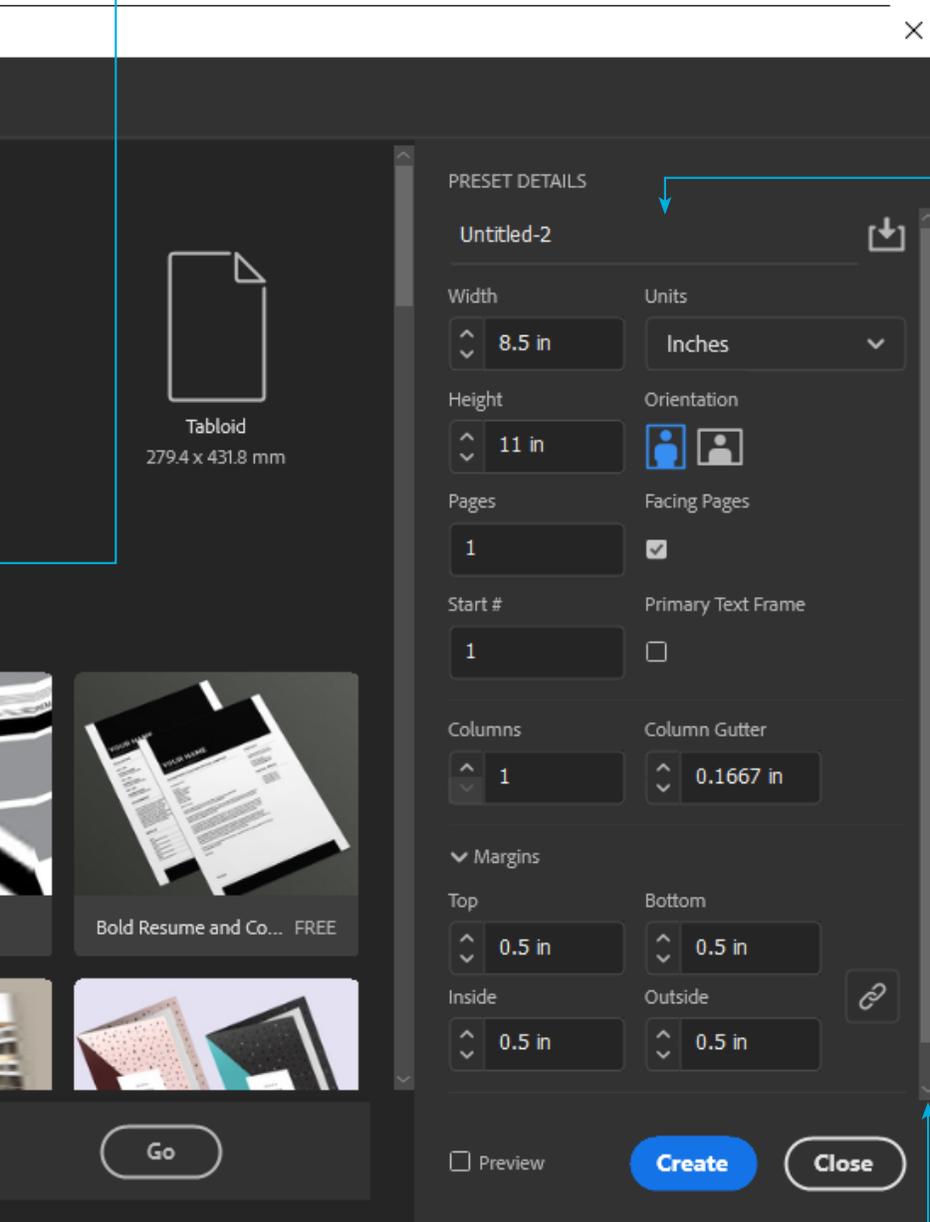
New Document Dialog Box



Document Preset thumbnails

Template thumbnails

Click **View All Presets +** to see an expanded set of available presets.



Document setup options can be customized in the **PRESET DETAILS** pane (see pages 12-13 for details).



The **Ctrl** key (Windows) and the **Command** key (sometimes referred to as the “Apple” key on Mac keyboards), and the **Alt** key (Windows) and the **Option**  (Mac) key are used identically as modifier keys.

The **Shift** key is standard on both platforms.

The **Control** key is specific to Macs.



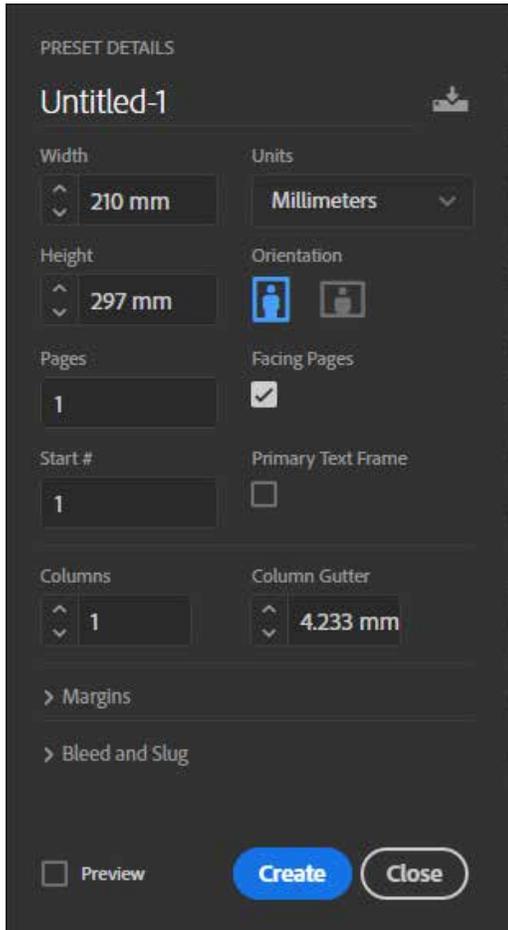
When you are already working in an InDesign document, choose

File > New > Document (**Ctrl/Command + N**) to access the New Document dialog box.

Depending on the size of your computer screen, you may need to scroll down to see all the document setup options.

Document Setup

When you click on a Blank Document preset, the settings in the Preset Details panel update according to the preset you selected. You can edit all the settings in the Preset Details panel to create the exact page settings for your design.



Size and Orientation

- 1 To create a custom page size, enter the exact dimensions you want in the **Width** and **Height** fields.
- 2 Use the **Units** pop-up menu to select the measurement system you want to use.
- 3 Click the **Landscape** icon to create a landscape page orientation. Portrait is selected by default.
- 4 Facing Pages is selected by default. Use the **Facing Pages** option to create a publication such as a magazine, brochure or book that will consist of double-page spreads. With **Facing Pages** selected, 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 Enter the number of pages you want in the **Pages** entry box. 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.
- 6 Use the **Start #** entry field 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.

Bleed and Slug

A bleed is required in printing when you want an area of color, or an image, to run right to the edge of the final trimmed page size. The bleed essentially allows for a margin of error during the printing and trimming process. Ask your commercial printer for their required bleed amount before you start your document.

Enter values for **Slug** to define an area outside the page area and bleed where instructions to the printer or other information relating to the document, such as title and date, can appear.

Both the slug and bleed areas are trimmed and do not appear on the final printed page.

...cont'd

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 pages 130-131 for further details), the pages start numbering from the value you enter in this field.



- 7 Select the **Primary Text Frame** option to create an automatic text frame on the A-master that fits to the margins and matches the number columns and gutter specified in the dialog box.



The **Primary Text Frame** option is useful if you want to create a publication with a regular, rigid text frame requirement – for example, a novel or a training manual.

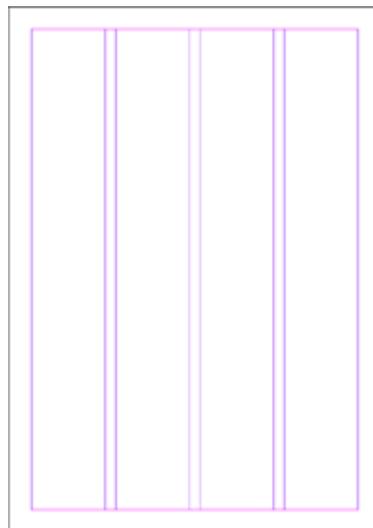
Margin Guides

Set margin guides to define the main text area of your document. This is often referred to as the “safe text area”. 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 Enter values for **Top, Bottom, Left/Right, Inside/Outside**.
- 2 Alternatively, 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.

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.



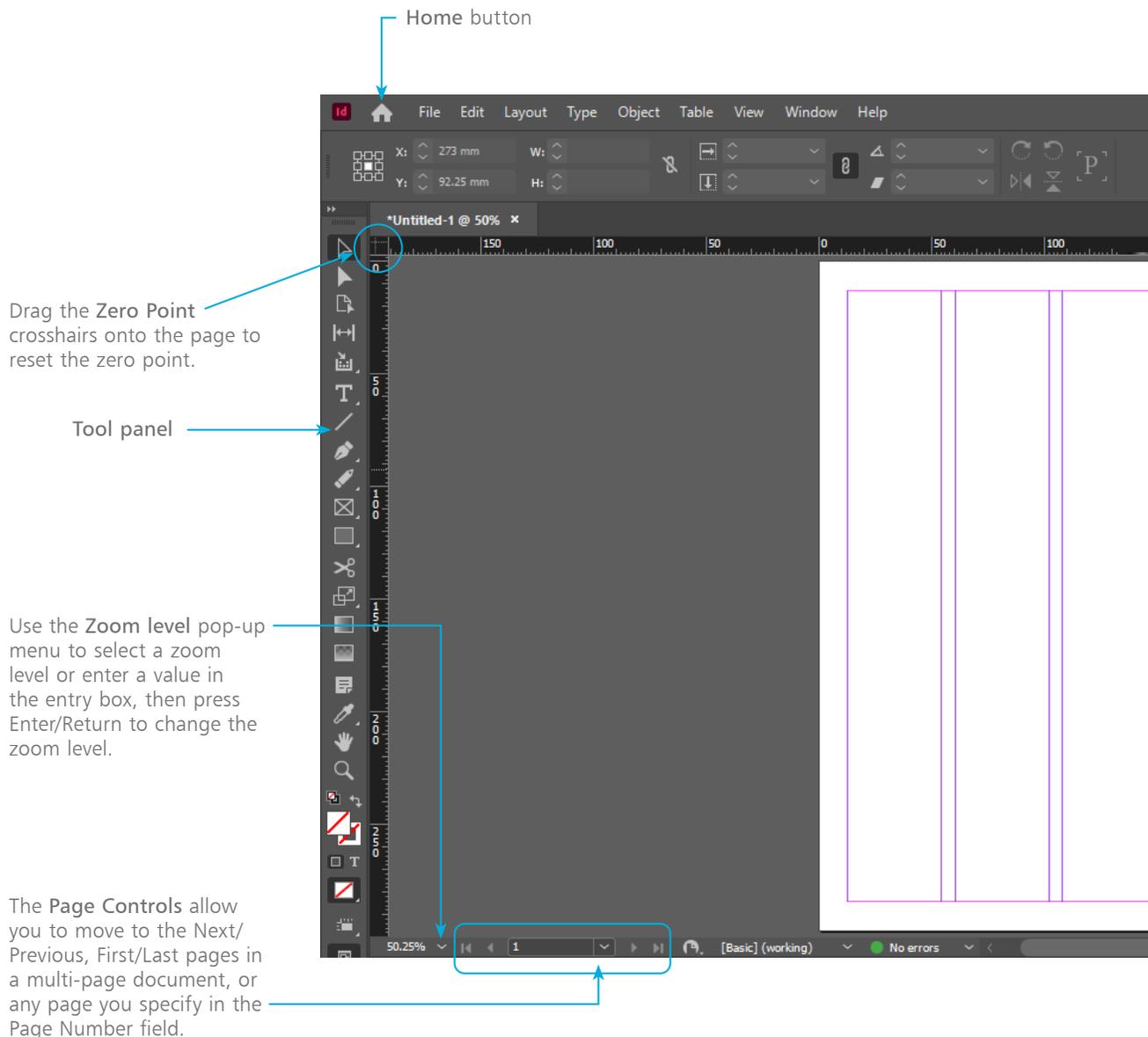
- 1 Enter the number of columns you want. Specify a **Column Gutter** – the space between columns. InDesign calculates the width of columns based on the overall width of the page, the number of columns, and the values of margins and gutters.
- 2 When working in a document, to change margin and column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



The Working Environment

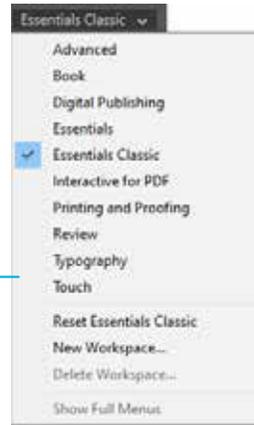
The Adobe InDesign interface is virtually identical on both the Windows and Macintosh platforms, making it easy to work in both environments without the need for extensive retraining.

This book uses a mixture of Windows and Macintosh screenshots, and the instructions given apply equally to both platforms.



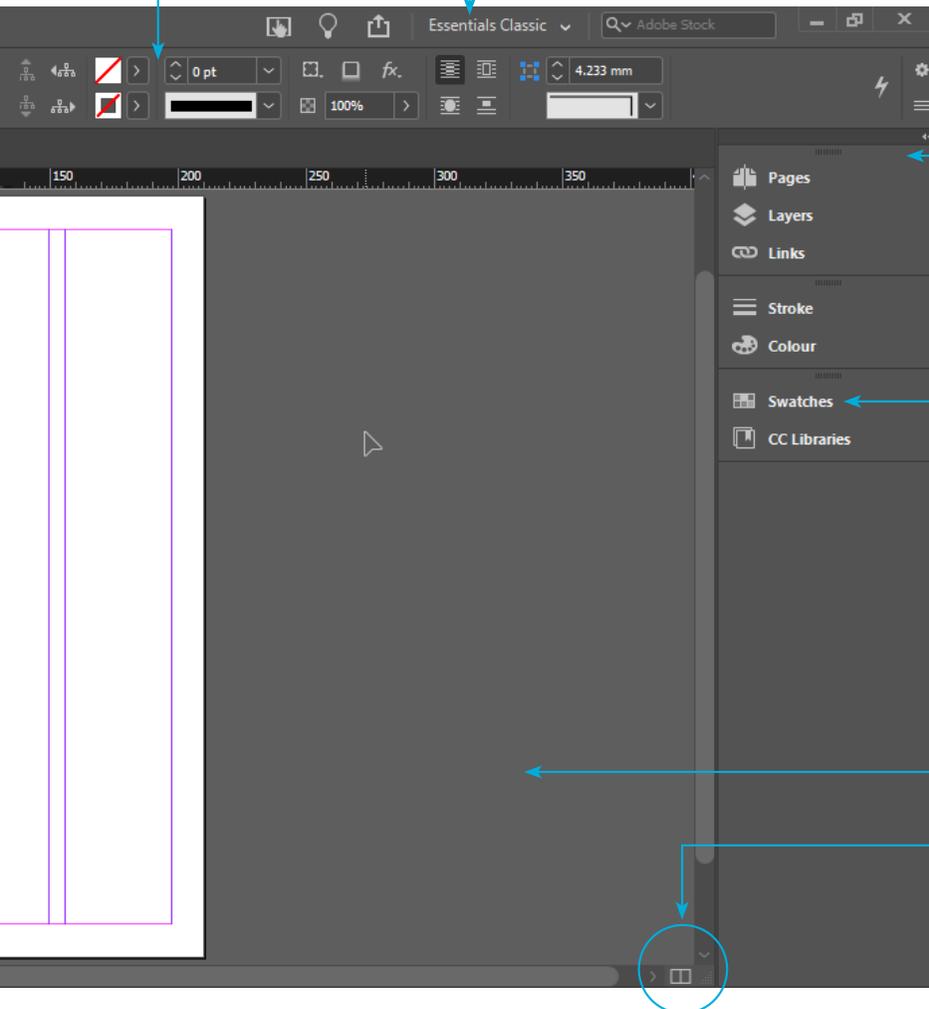
Based on over 20 years' experience teaching and using Adobe InDesign, the **Essentials Classic** workspace provides the best balance between ease of use and access to features for new users whose aim is to develop their design and publishing skills to produce high-quality, creative results.

As you gain confidence and develop your InDesign skillset, you should consider moving to the **Advanced** workspace.



The **Control panel** (not visible in the Essentials workspace) provides immediate access to a huge variety of powerful, essential InDesign controls.

Workspace pop-up



Panel Dock – Essentials Classic workspace

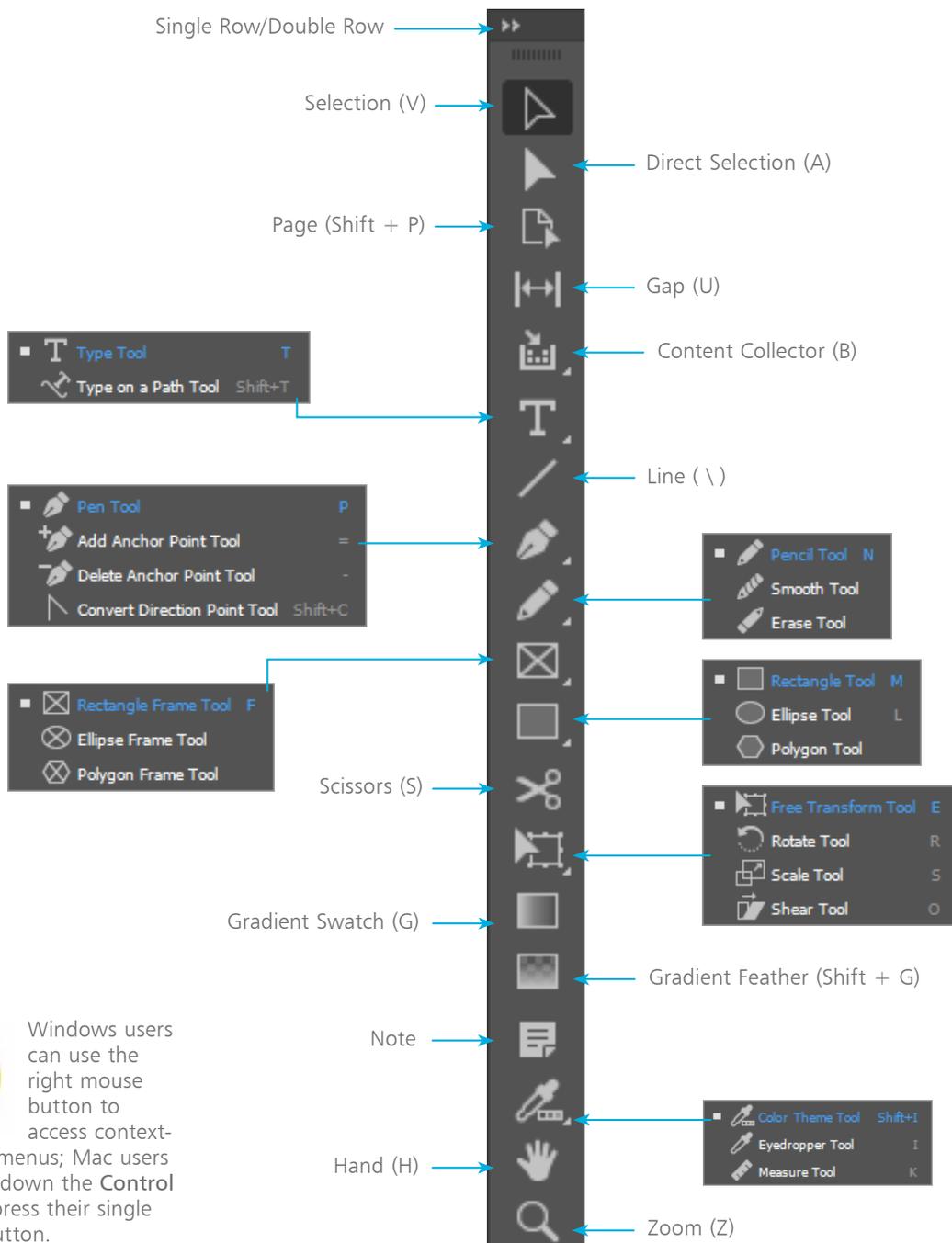
Click on a panel icon in the Panel Dock to expand the panel, along with other panels in the same panel group.

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. It is a good practice to clear the Pasteboard of all unused objects prior to final output to avoid any possibility of confusion.

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.

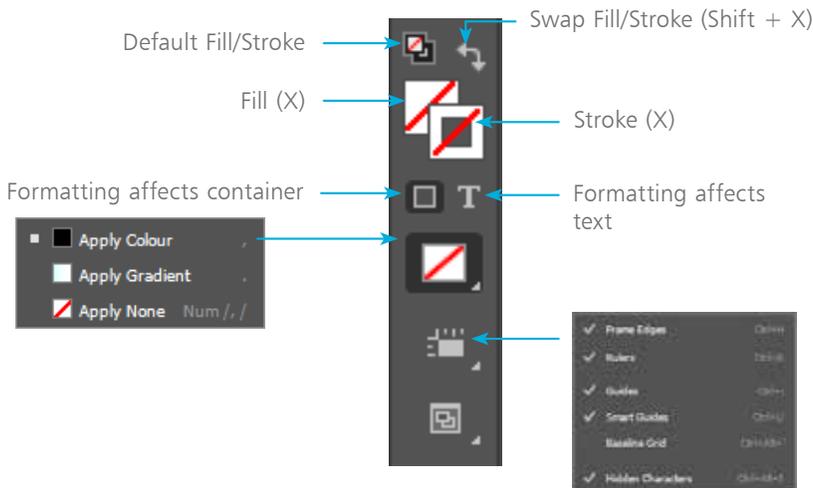
The Tool Panel

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



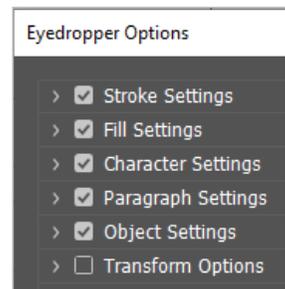
Windows users can use the right mouse button to access context-sensitive menus; Mac users can hold down the Control key and press their single mouse button.

...cont'd



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, gray 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 the 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.



If you find the Tool Tip labels distracting, you can turn them off: choose Edit

> Preferences > Interface (Windows) or InDesign > Preferences > Interface (Mac), then change the Tool Tips pop-up to None in the Cursor and Gesture Options section.

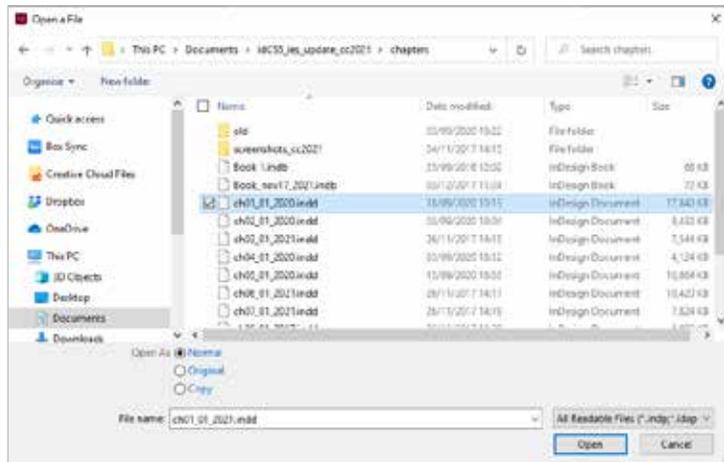


InDesign documents have the extension .indd. InDesign templates have the extension .indt.

Opening Documents

As well as creating new InDesign documents, you will often need to open existing documents. If you open an InDesign document created in 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 operation 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.



Choose **File > Open Recent** to access a list of your most recently used InDesign files.

- 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**.



When you are working on an InDesign document, you can click the Home button to return to the Home screen (see pages 8-9).



From the Home screen, click the Back to InDesign button to return to any active InDesign document you have open.

Zooming and Scrolling

Use the **Zoom tool** in the **Zoom Level** pop-up menu and a variety of keyboard shortcuts for changing the zoom level as you work on a document. You can use the **Hand tool** and the scroll bars for moving around the document.

- 1 To use the **Zoom tool**, select it, position the Zoom cursor in the document window, and then click to zoom in at the cursor position by preset increments. With the **Zoom tool** selected, hold down **Alt/Option** to change the cursor to the zoom out cursor. Click to zoom out by preset decrements.

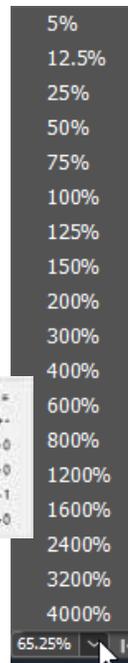
- 2 One powerful zoom technique is to press and drag with the **Zoom tool** to define an area on which you want to zoom. A dotted rectangle appears, defining the zoom area. The smaller the zoom area you define, the greater the resulting magnification.



- 3 You can use standard scroll bar techniques to see different parts of a page, or you can use the **Hand tool**: select the **Hand tool**, position your cursor on the page, and then press and drag to scroll the page.

- 4 You can zoom to preset percentage levels using the **Zoom Level** pop-up menu in the Application bar along the top edge of the InDesign workspace.

- 5 The **View** menu offers standard options for changing the magnification of the page. The keyboard shortcut is listed with each option.



With any tool other than the **Zoom tool** selected, hold down **Ctrl/Command** + **Spacebar** to temporarily access the **Zoom tool**. Add **Alt/Option** to the above combination to access the zoom-out option.



With any tool other than the **Hand tool** selected, hold down the **Spacebar** on the keyboard to gain temporary access to the **Hand tool**. If you are working with the **Type tool**, hold down **Alt/Option** to access the **Hand tool**, otherwise you will introduce spaces at the Text Insertion Point.



Your workspace is the arrangement of panels and document

windows visible as you work in InDesign. There is a wide variety of techniques for managing your workspace so that you can work comfortably, efficiently and in a way that suits your own individual preferences.



You can save a workspace so that you can quickly and easily recreate a

particular arrangement of panels. To do this, go to the Workspace pop-up menu and select **New Workspace**. Enter a name for your custom workspace, then click **OK**. The custom workspace appears in the list of workspaces.



To move a floating panel into the Panel Dock, position your cursor in the

gray bar at the top of the panel, then drag the panel into the Dock. A bright blue bar indicates where the panel will appear when you release the mouse button.

Workspaces and Panels

Workspaces

Most of InDesign's functionality is accessed through panels that contain groups of related controls. Panels give you quick and easy access to the controls you need to use most frequently. Panels are grouped together in a "Panel Dock" running down the right-hand side of the InDesign window.

The panels you see initially are determined by the active workspace. The default workspace is the Essentials workspace, but you can select a different workspace, offering a different set of panels, to suit your needs.

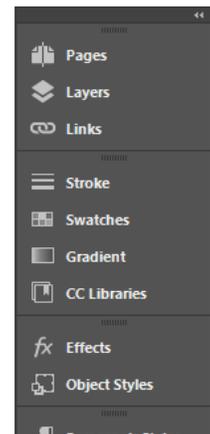
- 1 Use the **Workspace** pop-up menu to choose a default arrangement of panels to suit your requirements. You can modify a default workspace using the techniques outlined below to create a custom workspace.
- 2 To revert a modified workspace to the default arrangement, you can select **Reset [name of workspace]** from the **Workspace** pop-up menu.
- 3 Additional panels, not displayed in the Panel Dock, are available from the **Window** menu – for example, choose **Window > Info** to show the Info panel. When you show such a panel from the **Window** menu, it appears as a "floating panel". You can move floating panels around on your screen, or you can attach them in the Panel Dock.



Managing Panels and the Panel Dock

The following techniques will help you customize the way you work with panels and the Panel Dock.

- 1 Click the **Expand panels** button (☰) to display expanded panel groups. Click the **Collapse to Icons** button (☰) to shrink the dock to icons and labels. (This screenshot shows the Advanced workspace Panel Dock.)



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Position your cursor on the left edge of the Panel Dock. When the cursor changes to the bidirectional arrow (↔), drag to the right to create an icons-only dock. Drag to the left to expand the dock manually.

- 2 For the Panel Dock in workspaces showing icon labels, click the panel name to display the panel as a pop-out panel.
- 3 For an expanded dock, to make a panel active, click its tab. The tab highlights, and the options for the panel are displayed.

The Essentials Workspace Panel Dock

The Essentials workspace Panel Dock provides three main tabs along the top: Properties, Pages and CC Libraries. The Properties tab contains a variety of context-related panes, where the panes that are available change depending on what you have selected in your InDesign document:



Panels, other than the Properties panel in the Essentials workspace,

have a panel menu button (☰) allowing you to access additional commands:



Some panes in the Properties panel – for example, Transform and

Text Wrap – have a More Options button (⋮) to display an extended set of related controls.



Properties panel – nothing selected



Properties panel – Graphic Frame selected



Properties panel – Text Frame selected



The Control panel is available as a default panel for the

Advanced, Essentials Classic, Book, Digital Publishing, Interactive for PDF and Typography workspaces. (See pages 20-21 for information on selecting a workspace.)

The Control Panel

The Control panel is one of the most versatile panels in InDesign. The default position for the panel is docked below the Menu bar. It provides convenient access to an extensive range of settings and controls that change depending on the tool you are working with and the object you have selected.

- 1 When you are working in a text frame with the **Type tool** selected, you can choose between the **Character Formatting Controls** button and the **Paragraph Formatting Controls** button as required.



Graphic/Shape frame selected with Selection tool



Text frame selected with Type tool



Panels in workspaces other than Essentials have a panel menu

button (☰), giving you access to additional commands.

“Quick set” document preferences

When working with the Control panel, or any other panel or dialog box in InDesign, if you make a change to a setting **with nothing selected**, that setting becomes the default for objects you subsequently create.

For example, if you use options in the Control panel to change the font to Arial and the type size to 72pt, the next time you create a text frame, text you enter appears with these settings.

This is a useful and powerful feature, but in the early stages of learning InDesign, be careful that it doesn't catch you out.

Remember – these preferences are specific to the document you are working in.

If you are setting up templates for professional publications such as books, magazines and newspapers, be very careful as to which paragraph, character and object styles are set when you create a template.

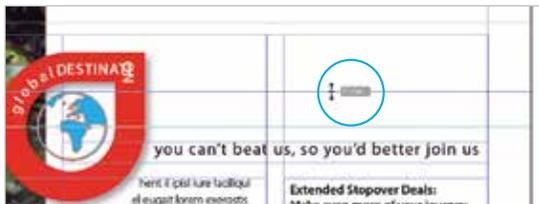
Ruler Guides

Ruler guides are non-printing guides that are used to align objects accurately. The default color for ruler guides is light blue. When **Snap to Guides** is **On**, Drawing tool cursors snap onto guides when they come within four screen pixels of the guide. Also, when you move an object, the edges of the object will snap onto guides.

- 1 To create a ruler guide, make sure the rulers are showing; choose **View > Show Rulers (Ctrl/Command + R)** if they are not. Position your cursor in either the top or the left ruler then press and drag onto the page. When you release, you create a ruler guide at that point. Look at the Control panel or the Transform panel X/Y fields to get a readout indicating the position of the cursor as you press and drag.



- 2 To create a ruler guide that runs across both pages in a spread, double-click in the ruler at the point at which you want the guide. Alternatively, drag from a ruler but release the mouse when the cursor is on the Pasteboard area surrounding the page.
- 3 To reposition a ruler guide, select the **Selection tool**, position your cursor on an existing guide; then press and drag. A double-headed arrow cursor appears, indicating that you have picked up the guide.

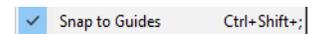


- 4 To remove a ruler guide, select the **Selection tool** and then click on the guide. It changes color, indicating that it is selected. Press the **Backspace** or **Delete** key. Alternatively, drag the guide back into the ruler it came from.



You can switch Snap to Guides off by choosing **View > Grids & Guides >**

Snap to Guides. A tick mark next to the command indicates that Snap to Guides is On:



A “spread” usually consists of two pages – a left- and a right-hand page – viewed side by side. For example, when you read a magazine or a book, you are viewing spreads.



Click the right mouse button (Windows), or **Control + Click** (Mac) on the vertical or horizontal ruler to change the ruler units via a context-sensitive menu.



In a document with multiple layers, ruler guides appear on the active layer. When you hide the layer you also hide the layer's ruler guides (see pages 91-92).



Provided that the Show Transformation Values checkbox is selected (Edit/InDesign > Preferences > Interface) an on-screen measurements label readout appears at the cursor as you create or move a ruler guide.



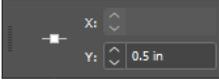
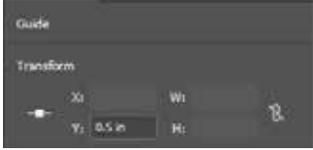
Use the keyboard shortcut **Ctrl/Command + Alt + G** to select all guides on a page or spread.

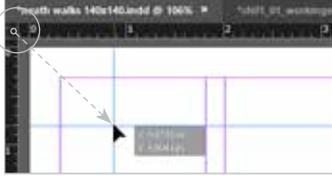


To lock guides on a specific layer, select the layer then choose **Layer Options for ...** from the Layers panel menu (☰), or double-click the layer in the Layers panel and select the **Lock Guides** option.

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- 5 To position a guide with complete precision, drag in a guide and position it roughly where you want it. Click on the guide with the **Selection tool**, then enter the position you want in the **X** or **Y** entry field in the Control panel or the Transform pane of the Properties panel when working in the Essentials workspace. Press **Enter/Return** to apply the new value.



- 6 To create a vertical and horizontal guide simultaneously, position your cursor in the crosshair area, where the vertical and horizontal rulers meet. Hold down **Ctrl/Command**, then press and drag onto the page. Release the mouse button before you release the **Ctrl/Command** key, otherwise you will reposition the zero point.



Hiding/Showing and Locking/Unlocking Guides

- 1 To lock an individual guide, click on it with the **Selection tool** to select it. The guide changes color to indicate that it is selected. Then, choose **Object > Lock (Ctrl/Command + L)**. If you try to move the guide, a padlock icon appears indicating the guide's locked status. To unlock a locked guide, click on it to select it, then choose **Object > Unlock All on Spread (Ctrl/Command + Alt/Option + L)**. This option also unlocks any locked objects on the page or spread at the same time.
- 2 To lock all the guides for an entire document, regardless of which layer they are on, choose **View > Grid & Guides > Lock Guides (Ctrl/Command + Alt/Option + ;)**. A tick mark next to the option in the menu indicates that the guides are locked. Use the same option to unlock the guides.
- 3 To hide/show all ruler guides as well as margin and column guides, choose **View > Grids & Guides > Hide/Show Guides (Ctrl/Command + ;)**. This command does not hide frame edge guides, which define the size and position of frames on a page. Choose **View > Extras > Hide/Show Frame Edges (Ctrl + H – Windows; Command + Alt/Option + H – Mac)** to hide/show frame edges.

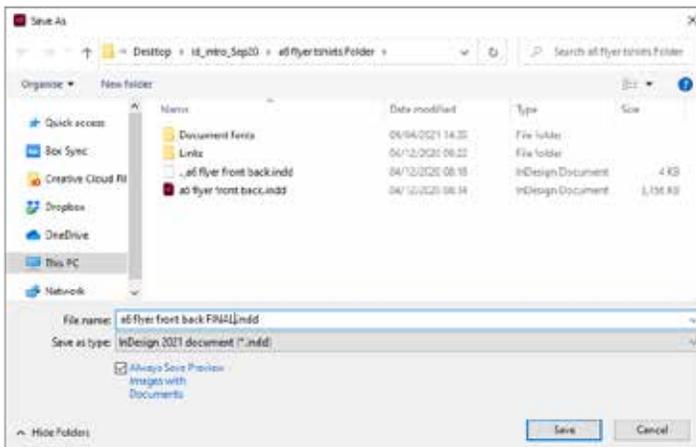
Saving Documents

It is important to be able to use the **Save As**, **Save**, and **Save a Copy** commands as necessary. To avoid losing work, save soon after you start working on a document and remember to save regularly as you make changes.

Save As

Use the **Save As** command soon after starting a new document. **Save As** enables you to specify a folder and name for the document.

- 1 To save a file for the first time, choose **File > Save As (Ctrl/Command + Shift + S)**. Use standard Windows/Mac dialog boxes to specify the folder into which you want to save the document.



- 2 Make sure the **File name** entry field is highlighted. Enter a name for the document. Leave the **Save As Type** pop-up (Windows) or **Format** pop-up (Mac) set to **InDesign 2021 document**. Click on **Save**. The name of the document appears in the document name tab or the title bar of the InDesign document window.

Save

Use the **Save** command regularly as you build your InDesign document so that changes you make are not accidentally lost due to



You can also use the **Save As** command when you want to create a new version of the document on which you are working. Use **File > Save As**, specify a different location and/or enter a different name for the file. When you OK the **Save As** dialog box you continue to work on the new file; the original remains as it was when you last saved it.



Use the shortcut **Ctrl/Command + Alt/Option + Shift + S** to save all open documents at the same time.



To revert to the last saved version of a file, choose **File > Revert**. Confirm the revert in the warning dialog box. The file reverts to the stage it was at when you last used the **Save** command. This option can sometimes be more efficient than using repeated **Undo** commands.

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any system or power failure. Each time you use the **Save** command, changes you have made to the document are added to the already saved version of the file. You do not need to rename the file or specify its location every time you use the Save command.

- 1 To save a file, choose **File > Save (Ctrl/Command + S)** at regular intervals as you build your document.



Choose **File > Close** when you finish working on a document. If

you have not already saved the file, in the warning box that appears, click **Save** to save and close the file, click **Cancel** to return to the document without saving, or click **Don't Save** to close the document without saving any changes.

Save a Copy

Use the **Save a Copy** command to save a copy of a document at its present state. When you have saved a copy, you continue to work on the original file, not the copy.

- 1 To save a copy of a document at its present state, choose **File > Save a Copy**. Use standard Windows/Mac dialog boxes to specify the folder into which you want to save the document. Make sure the **File name** entry field is highlighted. Enter a name for the document. Click the **Save** button. The copy is saved in the location and with the name specified. You continue to work on the original file.

Saving Templates

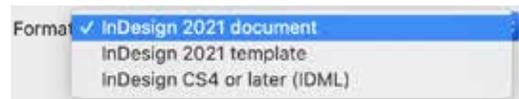
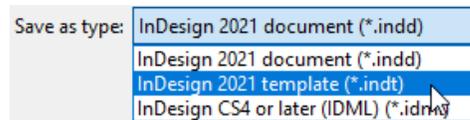
Save a document as a template when you want to create a series of documents with consistent layout, text formatting, color and graphic elements. For example, if you are creating a monthly newsletter, set up an InDesign document that contains all of the standard guides, master pages, style sheets, colors, placeholder frames and graphics. Each time you begin a new issue, open the template and import new content into the existing structure; this will ensure consistency from month to month.



When saving InDesign files, avoid using reserved characters such

as: / \ : ; * ? < > , \$ %. Reserved characters can have special meanings in some operating systems and can cause problems when files are used on different platforms.

- 1 To save a document as a template, follow the steps for the **Save As** command, but choose the



InDesign ... template from the **Save as type** pop-up (Windows) or the **Format** pop-up (Mac).