

InDesign NOW

Getting up to speed in InDesign

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INDESIGN

InDesign Now

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InDesign Now

Chapter 1:

An Overview



Introduction

Welcome to InDesign, Adobe's answer to Quark. If you've never seen it before, but are familiar with other Adobe products like Illustrator or Photoshop, then very soon you will feel right at home. Much of what you already know from these other programs will transfer over.

With the exception of the appearance of palettes, InDesign is exactly the same program whether it is on a Windows or a Mac platform. You can open an InDesign file created on a Windows machine with a Mac and vice-versa.

InDesign is a hybrid program, sort of a monster word-processing program combined with a limited drawing program.

The word processing part has a lot of heavy duty features for really complex long projects and some really tricky precise options for typography. The drawing program part allows you to create vector graphics without having to leave the program.

InDesign is more a program for **assembling**, rather than **creating** stuff from scratch.

The Creative Suite Concept

InDesign CS2 is part of Adobe's Creative Suite package, a group of related software programs. The idea is that you could create **anything** (graphic design wise) without every having to leave the Creative Suite or use any other software (or software provider) .

So you might browse for files using **the Bridge**, open a file from the **Version Cue**, create text using **InCopy**, then layout the text and images in **InDesign**, at anytime bouncing over to **Photoshop** to edit the photos, or over to **Illustrator** to create the graphics, then output the whole thing as a .pdf **Acrobat** file for print. If you need the document to go on the web, you would package it for **GoLive**, optimizing the images in **ImageReady**.

This would be easy, fast and efficient, because the programs all work and look much the same. Stuff is in the same place in all the programs, conventions are the same, and even keyboard shortcuts are pretty much the same across the board. Output is less problematical, nothing gets lost in translation, because it's **not** translated. It's still within the same suite.

Files would import in their native software format. You don't have to save a Photoshop image as a flattened jpeg before you can import it. You can just import the native .psd file, layers, styles and all.

In reality, it is a pretty good concept. It's not flawless, and there is a bit of a learning curve, but it's better than anything we've had in the past. I think you're going to like it.

Adobe Creative Suite 2

Some old timers will tell you that when desktop publishing began, things were simple. We only had three programs: Photoshop for photos, Illustrator for drawing and Quark for combining them into one document. Ahhhh, the good ol' days.

WRONG. This is a LIE. Things were **NEVER** simple. Getting a photo or drawing from one program to another was difficult, and much of the time when you got it over there it wouldn't print right. Only certain limited file types could be used, one program wouldn't "talk" to the other, resolution, color spaces, vectors, paths, etc. were not always compatible. Sometimes it was a nightmare.

But over the past few years we have seen what they call "convergence"; the coming together of different programs to achieve a unified goal. That's the idea behind Adobe's Creative Suite. Several programs, all bundled together, make one giant super-program. While the Creative Suite programs are independent of each other and can be purchased separately, they are tightly integrated, use the same color spaces, use similar workspaces and share many keyboard shortcuts. You can seamlessly slide a document back and forth between the programs, almost as if it were one program.

This is an InDesign book, but since the Creative Suite holds many benefits for designers, let's take a look at it. Notice that while each program has a forte, there are also areas of overlap, where the same operation could be done in one of several programs.

The Adobe Creative Suite includes these programs;

Adobe Creative Suite 2

Organize



A visual file browser, a "bridge" to the other programs. Use this to organize photos and other documents. Lets you view vector or raster based documents created by almost any program. Many options for sorting, labeling, viewing, renaming, batch processing operations. All programs in the Creative Suite have the Bridge icon in their options bar so you can go directly to the Bridge.

Create



Use to draw and create vector based graphics. Fair text handling abilities. Illustrator's native file is the .ai (Adobe Illustrator) file.



Use to edit photos and/or create raster (pixel) based graphics .Limited ability to create and modify vector graphics and edit text, which is vector based. Photoshop's native file is the .psd (Photoshop document).

Web



Use ImageReady to optimize images and graphics created in Photoshop for later use in web sites. Raster-based, limited vector abilities and limited text abilities.



Use GoLive to build and manage web sites. Imports graphics, photos and animations. Creates or imports text to create hyper linked web pages.

Print



Use InDesign to layout everything from a simple ad to complete multi-volume books and magazines. Handles raster based photos and graphics, vector based drawings, and text. You can do some vector based drawing in InDesign, but if you need to do much, go to Illustrator. InDesign's native file is the .ind (InDesign document).



Use InCopy like a limited version of InDesign to allow writers to edit text in a page layout environment so they can see how their copy will fit, but prevents them from messing up page layouts or compositions.

Version Cue is a file-sharing program that provides you and other users in your work group access to share and edit files over a network. If you aren't sharing files across a network, this has no benefit to you. While it is part of the Creative Suite, it is not included with all the individual programs.

File Types

As I said earlier think of InDesign as a program for assembling rather than creating projects. To that end, InDesign can import, place and modify many kinds of image files, including .JPG, .GIF, .BMP, .EPS, PSD (native Photoshop files), .AI (native Illustrator files), and several kinds of text files, such as Microsoft Word and ASCII text files. It can also, with some limitations, open Quark and Page-Maker files.

But InDesign can only create four types of files. They are:

.INDD InDesign Documents. This is just your basic layout project, from a single page flyer to a multiple page magazine or book.

The limit for the number of pages in a single INDD document is 9,999 pages, but a single document that long would be a bad idea. The better arrangement would be to break the project up in to smaller IDD documents then assemble them as a . . .

.INDB InDesign Book. This assembles multiple IDD files into one larger project. Since an INDB file is only keeping track of other files, it is much smaller and easier to handle. This also means there is no real limit to the size of a project .

.INDT InDesign Template. This is just an InDesign document that is meant to be modified later on, again and again.

.INDL InDesign Library. This is just an InDesign “in house” file that keeps graphics handy that will be reused throughout a project.

InDesign files can only be opened by InDesign. For that matter, CS2 (the present version) can open files created with CS (the previous version), but CS has some difficulty opening files created with CS2.

If you need someone without InDesign to view an InDesign document on a computer, then you can export the file as a...

.PDF Portable Document Format. InDesign doesn't save a file as a .PDF, but it can export a file as a .PDF. Just click on File>Export... From the drop-down menu at the bottom, select PDF, then set the options to your need. InDesign has many options for .PDF files including e-books, screen, print, and press.

Workspace

Turn on your computer. After it boots up, start InDesign. If you see the Welcome screen, close it. With InDesign open, click Window>Workspace> Default.

So we will have something to look at open the file included with the book. Click on Open, navigate to the InDesign Now folder, and select the indd file “story.indd.

What you will see on your screen is approximately what you see at the top of the next page..

At the top you have the Drop-Down menus common to many computer programs.

Below the Drop-Down menus you see the Control Bar, similar to Photoshop's Options Bar, but different in that the Control Bar displays options for the **object** selected instead of the **tool**.

Also notice the many, many palettes, the document and the rulers.

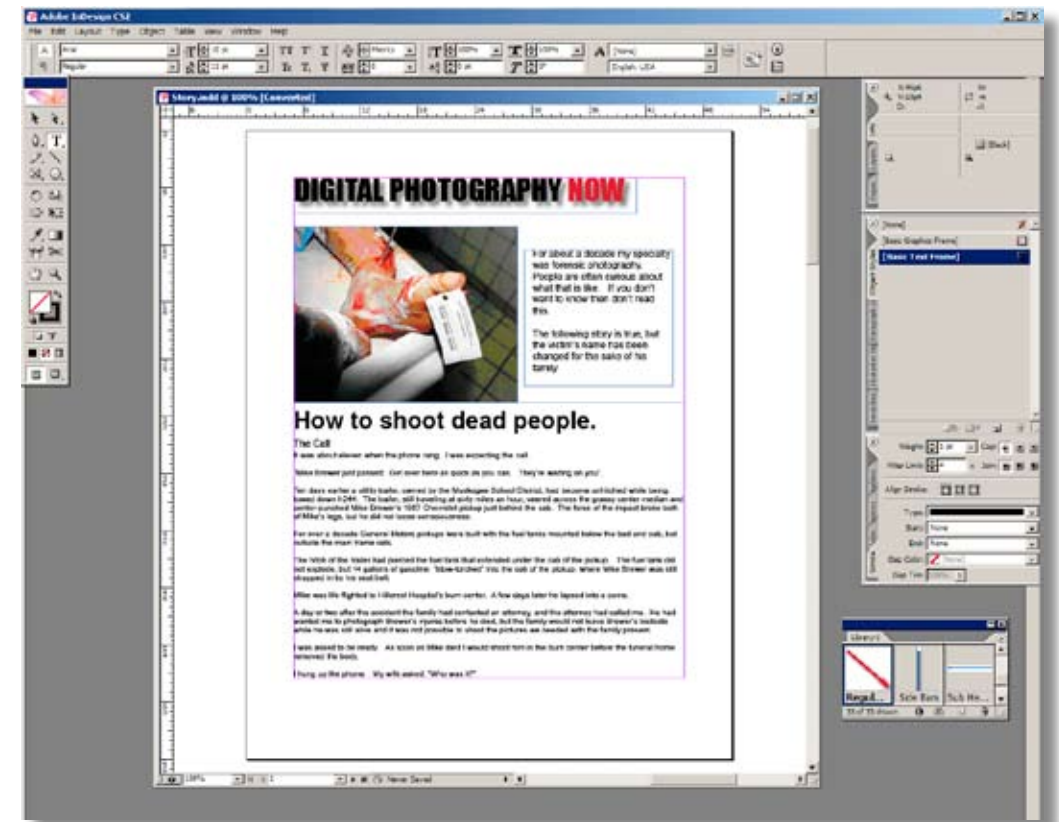
At first the program looks like there are a million things to remember (that's because there **are** a million things to remember). But Adobe always gives you several ways to do any command. For instance, you can zoom in from the Navigator palette, the Zoom tool, from the View menu or from a keyboard shortcut.

It isn't necessary that you know ALL the ways to do this. It's just necessary that you know one way, the way YOU like. If we were to eliminate all the redundancy in this program it would be about two-thirds smaller.

Many of the Keyboard shortcuts you are already familiar with from other programs in general and Adobe programs in particular apply to InDesign, such as Ctrl O, Ctrl S, Ctrl W (for opening, saving and closing files), Ctrl Z (undo), and Ctrl+ and Ctrl- (for zooming in or out).

Let's start by talking about the Drop-Down Menus at the top. We will explore them in more depth later, but for now just locate and identify these;

- **File:** the usual New, Open, Open Recent, Close, Save, Save As and Print.
- **Edit:** Undo and Redo, Cut,Copy,Paste, Word processing commands like Find/Change, Check Spelling and the Dictionary and Color Settings.
- **Layout:** for Margins, Columns, Rulers, Guides, First Page, Next Page, etc.
- **Type:** with the usual type options of Font, Size, etc.
- **Object:** several Transform commands, Arranging for stacking order of objects and Grouping/Ungrouping,
- **Table:** with all the usual options for creating tables (duh! that was a surprise).
- **View:** Zooming, displaying or hiding different items.
- **Window:** this is where palettes are made visible by checking or hidden by unchecking.
- **Help**



Toolbar

The toolbar is like the toolbars in other programs. Double click on the blue bar at the top of the toolbar to change it from vertical to horizontal; click some more to make it skinny. Click and drag the blue bar to move it out of your way or put it anywhere you want.

Tools

The black arrow is the **Selection Tool**, (v) just like Quark's Item tool.

Pen Tool, (p) A vector drawing tool.

The Pencil, (n) Smooth and Erase tools.

Frames Tool, (f) Rectangular, Elliptical, Polygonal

Rotate Tool.(r)

Shear Tool (o) shifts one side of an object.

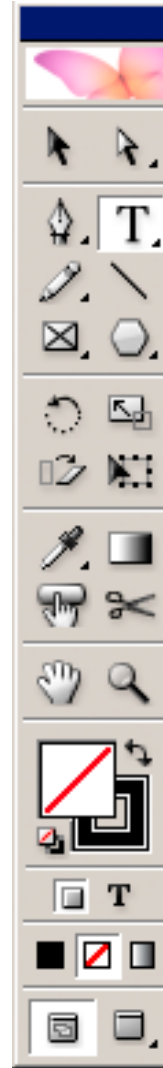
Eyedropper(i) and Measure tools.(k)

Button Tool, (b) for inserting navigation controls into interactive documents.

Hand Tool (h)-- for moving a document under a window.

Fill Box (x)-- indicates an object's fill.

These 3 ikons will apply a fill (left) a gradi-



Double Click here for **Online Help**.

The white arrow is the **Direct Selection Tool**, (a) just like Quark's Content tool.

Type Tool. (t) Also the Type-on-a-path tool.

Line Tool.(l) for drawing lines.

Shape Tool(l), draws Rectangular, Elliptical and Polygonal shapes.

Scale Tool -- for changing sizes of objects.(s)

Free Transform tool (e) combines the rotate and scale and move tools.

Gradient Tool(g).

Scissors Tool (c) for breaking a path.

Zoom Tool (z)-- to zoom in or out on the documents.

Stroke Box(x) displays the color of an object's stroke.

These two ikons determine whether the action will apply to an object or to text.

View: Normal View shows all guides and frames; Preview View hides all guides and frames(w - toggles between the two).

Keyboard shortcuts for tools are fairly intuitive. Most are either the first letter of the tool's name (P for the Pen tool) or a letter sounding like the tool (I for the EYEdropper). Hold the Shift key while clicking a shortcut to access a tool under the present visible tool.

Two exceptions are the Selection Tool (V) and the Direct Selection Tool (A). I have no idea why they choose these odd letters for these important tools.

The programmers at Adobe seem to have a palette obsession. InDesign has at least 39(!) palettes giving you more choices than you can shake a Quark at. If you have all your palettes out, you won't be able to find your document.

For efficiency's sake it will be necessary to be in control of these palettes.

The palettes are arranged on the right side of your screen. Click on any palette's folder tab and that palette, or actually, that palette group pops out with the palette you clicked on, on top. Click a second time and the palette group pops back to the side of your screen.

If you wish you can click and drag a palette or palette group out onto the work space. This rotates the palette to a vertical orientation, like the one below.

Access the **Window Drop-Down Menu**. Notice that five of the palette choices have a ▶ meaning even MORE palettes are available by clicking on those choices.

To display any palette, ✓ **its name** in the Window menu. **Un- ✓** to hide it.

Hide **ALL** palettes and the Toolbar by hitting the **TAB** key. Hit the **TAB** key a second time to bring them back.

Many palettes are **nested**, that is, grouped with other palettes. You don't have to stick with the original grouping. By clicking a file tab you can drag a palette out of its group or into another group.

To bring a **palette to the front** of the group: Click the file tab.

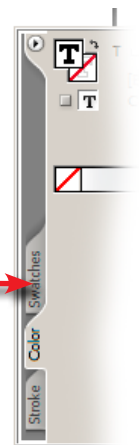
Some palettes don't show the full contents when opened. Double click a file tab to expand a palette's visibility.

Create Just click this icon to create a new whatever the palette contains.

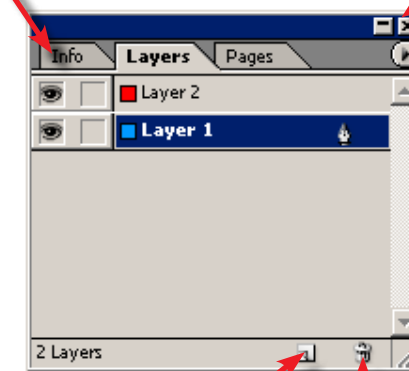
Duplicate any item in a palette by dragging it to the New icon.

Delete any item in a palette by dragging it to the trashcan.

For efficiency it's recommended that you drag out only the palettes you need. Close the rest.



Palettes



Minimize (_) or Close (X) a palette from the corner buttons.

Access a Palette Menu from here.

Stretch a Palette by dragging a corner.

Work Spaces

An arrangement of palettes, toolbars, etc on a desktop is called a **workspace**. No matter how you end up with the palettes arranged, displayed or hidden, you can always get back to the original default workspace by clicking Window>Workspace>Default.

When you get all the palettes out that you need, all the palettes you don't want out put away, when you get **everything** set up just like **you** like to work... then save that arrangement of work space components, by clicking Window> Workspace>Save Workspace to save the arrangement.

You might set up and save your workspace one way for when you are working on single page, graphic intensive projects, but have a completely different arrangement of palettes for multi page text heavy projects saved as a different workspace under a different name.

Also if you have more than one person using the same computer, each user can set up their own workspace just like they want it. Put their name on the workspace and everybody's happy.

When you are unhappy with your co-worker click on Window>Workspace>Delete workspace and delete their workspace.

In InDesign, a "page" is represented on your computer screen as a rectangle with a black outline. A two page spread has a black line down the middle, dividing the left page from the right.

Guides

On your page, the margins and columns are outlined by colored lines, referred to as **guides**. These are set up when you create a new file in the New File dialog box.

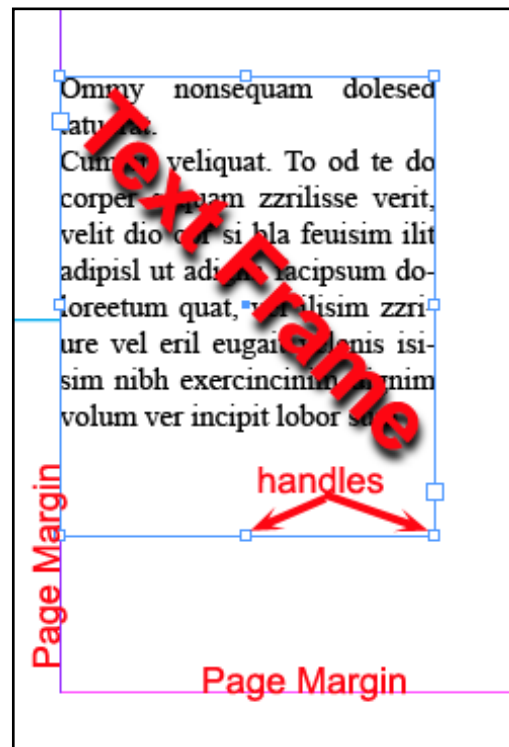
They are called guides because that's all they are; they don't actually restrict text to the margins; they just act as a reference for setting up the text boxes, that presumably you will line up on the guides.

Text and graphics are held in "frames" which are outlined by a colored line. The corners and sides have little square called handles. Moving the handles adjusts the sides of the frame. This frame/handles box is also referred to as a bounding box.

Turn these off and on from the View Menu, but to just temporarily hide them all, to see how your document is looking, click the Preview button at the bottom of the toolbar.

These, of course, are all non-printing items, unless you choose to print them from the Print Presets dialog box.

While your document is the size you make it , InDesign thinks of your document as "lying" on a larger area, called the **Pasteboard**. If you choose to you can put or even leave graphics or other objects outside of the document on this pasteboard. They don't print, but they would still be part of the file.



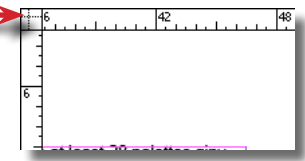
Pasteboard

While your document is the size you make it , InDesign thinks of your document as "lying" on a larger area, called the **Pasteboard**. If you choose to you can put or even leave graphics or other objects outside of the document on this pasteboard. They don't print, but they would still be part of the file.

Rulers

If rulers would help you in laying out your document, you can show or hide the **rulers** from the View Menu. Rulers are by default set to Picas. Set the Rulers to any imaginable increment from the InDesign>Preferences>Units ,Increments. The rulers don't have to match. Try setting the vertical ruler to Inches and the horizontal to Picas.

If you click and drag where the rulers cross in the upper right hand corner you will drag temporary guides, "**crosshairs**" over your document. When you release the mouse the crosshairs disappear. The rulers reset the zero point to where the mouse was released. Double click in the ruler box to reset the rulers to zero on the top left corner of the page.



InDesign gives you a host of ways to guide you in positioning objects in your document.

The first of these blue horizontal or vertical lines called **Guides**. To set a guide across a **page**, use any tool to just click and drag down (or right) from a ruler.

To set a guide across a **spread** hold down the Cmd key as you drag down. Dragging outside the page will make a pasteboard guide, inside the page will restrict the guide to that page.

Next is the Document Grid. Turn it's visibility off or on from the View Menu.

Next is the Baseline Grid, used to make all the text lines on all pages line up with each other. It's visibility is also controlled from the View Menu.

When you are working, you typically want all these margins, guides, frames and other non-printing items to help you layout the document. When these things are visible you are operating in the **Normal view** and at the bottom of the Tool Bar the Normal Viewing button is selected.

But when you want to see what the printed document is going to look like without all these non-printing items click the **Preview** button to hide them.

You can hide/show all the palettes with the TAB key, just like in Photoshop.

Put your cursor over any item, hold down the Control key and click (or right-click a two-button mouse). A **contextual menu** pops up with choices applicable for the particular object selected. These are much faster than moving and clicking the Drop-Down menus at the top of the screen.



Contextual Menus

View The story.indd document you opened earlier is several pages long. Obviously, you need to be able to view all of it and navigate around to view the other pages. You've got a lot of options here.

As I am sure you already know from other programs, with any document larger than your screen, you can use the **scroll bars** at the side to move around the document. You can also use the **Page Up** and **Page Down** Keys.

Hand Tool From the tool bar select the **Hand Tool (H)**. Click and drag with the Hand tool to move your document around on your screen. But you don't even have to select the Hand Tool from the tool bar. While you have almost any tool selected (exception being the Type Tool) just hold down the **space bar** and that tool magically becomes the hand tool. Release the space bar and you are back to your previous tool. Very "HANDY".

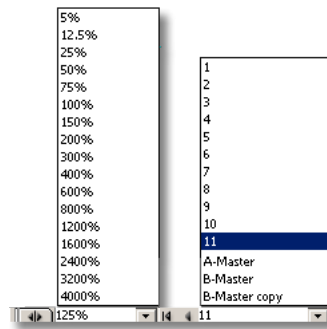


Zoom Tool Next to the Hand Tool is the **Zoom Tool (Z)**. Select it and click on your document to magnify the view one level. Keep clicking to keep zooming in. Hold the **Alt key** and click to zoom out.

With the Zoom tool selected, **click and drag** a marquee and the program will zoom in to fill the screen with your selected marquee.

Also zoom your view by clicking **Ctrl +** (zoom in) or **Ctrl -** (zoom out). When other tools are selected you can use the Ctrl-Space keys to temporarily access the Zoom tool.

Click on the **Layout Menu**. Click on Layout>in the sun (not really). From here we can click to go to the **First Page**, the **Previous Page**, the **Next Page** and the **Last Page**. We can also **Go Back** and **Go Forward**. However this is pretty clumsy.



At the very bottom left of the screen notice these two little menus, and several side arrows. Clicking the percent arrow gives you a menu of view percentages. If you don't like any of them, then type in the box the exact percentage of view you want and you will have it.

The other menu lets you click go to a particular page. This menu shows up to 100 pages. If your document has more than that, hold the **Alt key** while opening this menu to see all the pages.

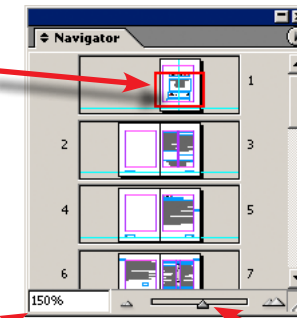
The Arrows work just like VCR controls to go forward, backward, to the first or last page.

Navigator

Click on Window>Object and Layout> Navigator. When the **Navigator Palette** is visible, click on the palette menu and select **View All Spreads**. If the palette menu says: **View Active Spread**, it means you are already **viewing all spreads** so don't click anything. You're seeing what I want you to see.

In a thumbnail view here is all your pages in all your spreads. Notice the page numbers at the side.

The Red Box shows what is visible on your screen right now. Drag the box to navigate to other pages or spreads.



Scroll down to see the other spreads, double-click a spread to jump to that spread on screen.

This displays the percentage of enlargement. Type in any number and the screen will display that enlargement.

Move this slider to zoom your screen view in or out.

There is yet another palette that is sort of a variation of the Navigator palette: the **Pages Palette**. If you don't see the Pages palette already out, Click Window>Pages.

We are going to be talking about this palette in depth shortly, but for now, just know the bottom half of the Pages Palette works like the Navigator. Double click on a page in the palette to center that page on your screen, Double click on the numbers under a spread to center that spread on your screen.

You can also fit a page or spread on your screen from the View menu: View>**Fit Page in Window**, View>**Fit Spread in Window**. Or to see the spread and the outlying pasteboard, **View>Entire Pasteboard**.

One last important point on viewing. To view your document at its best, click **View>Display Performance** and check **High Quality Display**. But if you have an unusually large document, or an older, slower computer, your graphics may slow the machine down. Changing the Display Performance to **Typical Display** will display the graphics at a lower resolution, which won't look as nice on screen, but your computer will run faster this way. In an extreme case, set the Display Performance to Fast Display, and InDesign will only display gray boxes where your graphics would be. This has NO EFFECT on how the document will look in print, only how it appears on screen.

If your graphics suddenly appear pixelated, check and see if the display performance has "slipped" off of **High Quality Display** to a lower resolution display. You can quickly change these settings by Control clicking (right click) on a page and select "Display Performance" on the bottom of the contextual menu.

This finishes this section. Close the story.indd file and if you are done for the day, exit InDesign, turn out the lights and go home.

Display Performance

InDesign Now

Chapter 2: The Bridge

InDesign Now

Bridge As I said earlier, InDesign is part of this Creative Suite concept. The “hub” of the Creative Suite is the **Bridge**. While the Bridge is a file browser, it is also sort of a control center (think of the **Bridge** on the Starship Enterprise’s flight deck) for the whole Suite and all the programs that make up the Suite. Let’s start by talking about the browser part of the bridge, we’ll look at its other control functions afterwards.

The Bridge as a Browser

Most designers are **visual thinkers**; we remember things as pictures, not as words. This makes it difficult for us visual thinkers to find files by their name; it would be easier for us to find files by what they look like.

Instead of giving you a list of file names, the Bridge displays a thumbnail of just about any kind of image file, such as the usual jpegs, bitmaps and gifs, plus Photoshop files, InDesign or Quark documents, multi-page Acrobat files, web pages, video clips, audio clips and lots of others, which makes things much easier for the visual thinkers.

The Bridge can be accessed from any of the CS programs from its icon, or can be opened as a free-standing program by itself, without any other program being open.

From the Control Bar of any Creative Suite program, click the Bridge Icon. After the Bridge Opens use the navigation tree to access the folder named **juststuff**



With the Bridge open...

Rotate or delete selected images from these icons.

Here is the tree of your computer's drives and folders.

This is a preview (larger thumbnail) of the whatever file is selected in the thumbnails pane.

Information about the file, such as size, type, date created, etc

Thumbnails. (tiny pictures) of the images in the juststuff folder. Double click a thumbnail to open it. Click once on a thumbnail (a gray matt appears around it) to select it.

This slider adjusts thumbnail sizes.

Switch to other views from here.

The Bridge’s default mode, shown above is the expanded mode and displays four windows of data. But much of the time, all we really want to do with the bridge is sort images, for which we only need the thumbnail window.