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About the Author

Galen Gruman is the principal at The Zango Group, an editorial and marketing consulting firm. Currently a regular contributor to *Macworld*, *Layers Magazine*, *CIO*, and *InfoWorld*, he has also been editor of *Macworld* and *M-Business,* executive editor of *Upside,* West Coast bureau chief of *Computerworld,* and vice president of content for ThirdAge.com. He is co-author of 20 other books on desktop publishing. Gruman led one of the first successful conversions of a national magazine to desktop publishing in 1986 and has covered publishing technology since then for several publications, including the trade weekly *InfoWorld,* for which he began writing in 1986, *Macworld,* whose staff he joined in 1991, and, most recently, *Layers Magazine*.

Dedication

To Rick, Karen, and Kyle Bull, for many years of wonderful holidays and cordial visits.

Contents at a Glance

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Introduction

⬤ ⬤

*W*hat is Adobe InDesign and what can it do for you? InDesign is a power-ful publishing application that lets you work the way *you* want to work. You can use InDesign as a free-form but manual approach to layout, or as a structured but easily revised approach. The fact that you can choose which way to work is important for both novice and experienced users because there isn't a single, correct way to lay out pages. Sometimes (for example, if your project is a single-instance publication), creating a layout from scratch — almost as if you were doing it by hand on paper — is the best approach. And sometimes using a highly formatted template that you can modify as needed is the way to go: There's no need to reinvent the wheel for documents that have a structured and repeatable format.

InDesign can handle sophisticated tasks, such as magazine and newspaper page layout, but its simple approach to publishing also makes it a good choice for smaller projects, such as one-off ads and fliers. InDesign is also a good choice for corporate publishing tasks, such as proposals and annual reports. Plug-in software from other vendors adds extra capabilities.

But that's not all. InDesign was designed from the ground up as an *electronic* publishing tool. That means that you can easily send documents to service bureaus and printing presses for direct output, which saves you lots of time and money. It also means that you can create documents for electronic distri-bution, particularly using the Adobe Acrobat Portable Document Format (PDF). These electronic files can include interactive features, such as buttons to play sounds or a movie.

After you get the hang of it, InDesign is quite easy to use. At the same time, it's a powerful publishing program with a strong following among the ranks of professional publishers — and the latest InDesign CS3 version is certain to reinforce that position. Part of its success is due to the fact that its interface is like that of its sister applications, Adobe Illustrator and Adobe Photoshop, which are also components of the Adobe Creative Suite.

If you are just getting started with InDesign, welcome! I hope you'll find the information in these pages to be helpful in getting you started.

How to Use This Book

Although this book has information that any level of publisher needs to know to use InDesign, this book is primarily for those of you who are fairly new to the field, or who are just becoming familiar with the program. I try to take the mystery out of InDesign and give you some guidance on how to create a bunch of different types of documents. Here are some conventions used in this book:

- ✓ **Menu commands** are listed like this: Window⇨Pages.

- ✓ **Key combinations:** If you're supposed to press several keys together, I indicate that by placing plus signs (+) between them. Thus, Shift+⌘+A means press and hold the Shift and ⌘ keys, and then press A. After you've pressed the A key, let go of all the keys. I also use the plus sign to join keys to mouse movements. For example, Alt+drag means to hold the Alt key when dragging the mouse.

  Note that the Macintosh sequence comes first, followed by the Windows equivalent.

- ✓ **Pointer:** The small graphic icon that moves on the screen as you move your mouse is a pointer (also called a cursor). The pointer takes on different shapes depending on the tool you select, the current location of the mouse, and the function you are performing.

- ✓ **Click:** This means to quickly press and release the mouse button once. On most Mac mice, there is only one button, but on some there are two or more. All PC mice have at least two buttons. If you have a multi-button mouse, click the leftmost button when I say to click the mouse.

- ✓ **Double-click:** This tells you to quickly press and release the mouse button twice. On some multi-button mice, one of the buttons can function as a double-click. (You click it once, the mouse clicks twice.) If your mouse has this feature, use it; it saves strain on your hand.

- ✓ **Right-click:** A Windows feature, this means to click the right-hand mouse button. On a Mac's one-button mouse, hold the Control key when clicking the mouse button to do the equivalent of right-clicking in programs that support it. On multi-button Mac mice, assign one of the buttons to the Control+click combination.

- ✓ **Dragging:** Dragging is used for moving and sizing items in an InDesign document. To drag an item, position the mouse pointer on the item, press and hold down the mouse button, and then slide the mouse across a flat surface.

How This Book Is Organized

I've divided this book into eight parts, not counting this introduction. Note that the book covers InDesign on both Macintosh and Windows. Because the application is almost identical on both platforms, I only point out platform-specific information when I need to, when I remember to, or both.

I have also included some bonus content on the InDesignCentral Web site (`www.InDesignCentral.com`).

Part I: Before You Begin

Designing a document is a combination of science and art. The science is in setting up the structure of the page: How many places will hold text, and how many will hold graphics? How wide will the margins be? Where will the page numbers appear? And so on. The art is in coming up with creative ways of filling the structure to please your eyes and the eyes of the people who will be looking at your document.

In this part, I tell you how to navigate your way around InDesign using the program's menus, dialog boxes, panels, and panes. I also explain how to customize the preferences to your needs.

Part II: Document Essentials

Good publishing technique is about more than just getting the words down on paper. It's also about opening, saving, adding, deleting, numbering, and setting layout guidelines for documents. This part shows you how to do all that and a lot more, including tips on setting up master pages that you can use over and over again. You'll also find out how to create color swatches for easy reuse in your documents.

Part III: Object Essentials

This part of the book shows you how to work with *objects:* the lines, text frames, graphics frames, and other odds and ends that make up a publication. And you'll discover how to apply some really neat special effects to them.

Part IV: Text Essentials

When you think about it, text is a big deal when it comes to publishing documents. After all, how many people would want to read a book with nothing but pictures? In this part, I show you how to create and manipulate text, in more ways than you can even imagine.

Part V: Graphics Essentials

Very few people would want to read a book with nothing but text, so this part is where I show you how to handle graphics in InDesign.

Part VI: Getting Down to Business

InDesign — especially with some of the enhancements in its latest version — is really good at handling the many kinds of documents that tend to be used in businesses, such as manuals, annual reports, and catalogs. This part shows you how to create tables, handle footnotes, create indexes, manage page numbering across multiple chapters in a book, and use text variables to make InDesign update text as needed based on the document's current context.

Part VII: Printing and Output Essentials

Whether you're printing a publication or simply creating a PDF file for readers to download from a Web site, you still need to understand the basics of outputting an InDesign document. This part is where I show you how to set up your output files, manage color, and work with service bureaus.

Part VIII: The Part of Tens

This part of the book is like the chips in the chocolate chip cookies; you could eat the cookies without them, but you'd be missing a really good part. It's a part that shows you some important resources that will help you make the most of InDesign. It also gives some pointers on switching to InDesign from QuarkXPress and Adobe PageMaker.

Icons Used in This Book

So that you can pick out parts that you really need to pay attention to (or, depending on your taste, to avoid), I've used some symbols, or *icons*, in this book.

When you see this icon, it means I am pointing out a feature that's new to InDesign CS3.

If you see this icon, it means that I'm mentioning some really nifty point or idea that you may want to keep in mind as you use the program.

This icon lets you know something you'll want to keep in mind. If you forget it later, that's fine, but if you remember it, it will make your InDesign life a little easier.

If you skip all the other icons, pay attention to this one. Why? Because ignoring it could cause something really, really bad or embarrassing to happen, like when you were sitting in your second-grade classroom waiting for the teacher to call on you to answer a question, and you noticed that you still had your pajama shirt on. I don't want that to happen to you!

This icon tells you that I am about to pontificate on some remote technical bit of information that might help explain a feature in InDesign. The technical info will definitely make you sound impressive if you memorize it and recite it to your friends.

Part I

Before You Begin

The 5th Wave   By Rich Tennant

"It says, 'Seth — Please see us about your idea
to wrap newsletter text around company logo.
Signed, the Production Department.'"

In this part . . .

You have your copy of InDesign and you'd like some basic information on how to get started, right? Well, you have come to the right place. Read along and, before you know it, you'll be sailing smoothly through InDesign. This part of the book gives you a general idea of what InDesign can do. I explain the layout approaches you can take and how to set up InDesign to work the way you work. Along the way, you'll find out how to navigate the plethora of panels, menus, tools, and shortcuts that can seem overwhelming at first but that soon become second nature as you gain experience using the program. Welcome aboard!

Chapter 1

Understanding InDesign Ingredients

*S*tarting to use a new software application is not unlike meeting a new friend for the first time. You take a long look at the person, maybe ask a few questions, and begin the process of becoming acquainted. Just as it's worthwhile to learn the likes and dislikes of a new friend, it's also worth your time to wrap your head around InDesign's unique style and approaches. When you do so, you'll find it much easier to start using InDesign to get work done.

This chapter explains where to look in InDesign for the features and capabilities you need to master. I introduce you to the process that InDesign assumes you use when laying out documents, explain some of the terms you'll encounter throughout the book, describe the unique interface elements in the document window, survey the most commonly used tools, and explain how InDesign packages much of its functionality through an interface element called a *panel*.

The InDesign Approach

Publishing programs have some similarities and some differences in their various approaches to the publishing task. One way to describe a program's approach to publishing is to talk about its *metaphor,* or the overall way that it handles publishing tasks.

Some programs use a *free-form* metaphor, which means that the method used to craft a document is based on assembling page elements as you would if they were placed on a traditional pasteboard until you were ready to use them. This is also called the *pasteboard* metaphor, which is an imprecise term because software that uses other metaphors can still include a pasteboard. The now-defunct PageMaker is the best-known example of the free-form approach.

Other programs approach page layout by using a *frame-based* metaphor, in which frames (or boxes) hold both the page elements and the attributes that control the appearance of those elements. QuarkXPress is the best-known example of the frame-based approach.

InDesign offers the best of both worlds because it incorporates both the free-form and the frame-based metaphors.

The frame-based metaphor

When you work with a frame-based metaphor, you build pages by assembling a variety of frames that will contain your text and graphics. First, you set up the basic framework of the document — the page size and orientation, margins, number of columns, and so on. You then fill that framework with text, graphics, and lines.

TIP These frames and lines need not be straight or square. With InDesign, you can create frames that are shaped by *Bézier curves.* (In the 1970s, French engineer Pierre Bézier created the mathematics that make these adjustable curves work.)

Why would you want to use frames? Publishers find several reasons why frames come in handy:

- ✔ **To create a template for documents, such as newsletters and magazines, that use the same basic layout elements across many articles.** You create the frames and then add the text and graphics appropriate for each specific article, modifying, adding, and deleting frames as necessary for each article.

- ✔ **To get a sense of how you want your elements to be placed and sized before you start working with the actual elements.** This is similar to sketching a rough layout on paper with a pen or pencil before doing a formal layout with InDesign.

- ✔ **To set up specific size and placement of elements up front.** You often work with a template or with guidelines that limit the size and placement of elements. In many cases, you can copy an existing frame because its size is the same as what you use in several locations of your layout. For

structured or partly structured documents, such as newsletters and magazines, it is usually easier to set up documents up front so that elements are sized and placed correctly; the less favorable alternative is resizing elements one at a time later on.

TIP

Whether you start by creating frames to hold graphics or text or you simply place the text and graphics directly on your page, you're using frames. When you directly place elements on the page, InDesign creates a frame automatically for each element. The frame that InDesign creates is based on the amount of text or the size of the graphic, rather than on your specific frame specifications. Of course, in either case, you can modify the frames and the elements within them.

The free-form metaphor

Working under a free-form metaphor, you draw a page's content as if you're working on paper. If you've been in the publishing business for a while, you might once have used wax to stick strips of type, camera-ready line drawings, and halftone pictures to a pasteboard. You would then assemble and reassemble all those pieces until you got the combination that looked right to you. The free-form metaphor encourages a try-as-you-go, experimental layout approach, which is particularly well suited to one-of-a-kind documents such as ads, brochures, annual reports, and some marketing materials.

TIP

If you use a frame-based approach to page layout, you can experiment with using the frames as placeholders for actual text and graphics. Visual thinkers like to work with actual objects, which is why the free-form metaphor works much better for them. With InDesign, you pick the metaphor that works for your style, your current situation, and your mood. After all, both approaches can lead to the same great design.

Understanding Global and Local Control

The power of desktop publishing in general, and InDesign in particular, is that it lets you automate time-consuming layout and typesetting tasks while at the same time letting you customize each step of the process according to your needs.

This duality of structure and flexibility — implemented via the dual use of the frame-based and free-form layout metaphors — carries over to all operations, from typography to color. You can use global controls to establish general settings for layout elements, and then use local controls to modify those elements to meet specific publishing requirements. The key to using global and local tools effectively is to know when each is appropriate.

Global tools include

- ✔ General preferences and application preferences (see Chapter 2)
- ✔ Master pages and libraries (see Chapter 6)
- ✔ Character and paragraph styles (see Chapter 14)
- ✔ Table and cell styles (see Chapter 20)
- ✔ Object styles (see Chapter 10)
- ✔ Sections and page numbers (see Chapter 4)
- ✔ Color definitions (see Chapter 7)
- ✔ Hyphenation and justification (see Chapter 15)

Styles and master pages are the two main global settings that you can expect to override locally throughout a document. You shouldn't be surprised to make such changes often because, although the layout and typographic functions that styles and master pages automate are the fundamental components of any document's look, they don't always work for all the specific content within a publication. (If they did, who'd need human designers?!)

Local tools include

- ✔ Frame tools (see Part III, as well as Chapter 17)
- ✔ Character and paragraph tools (see Chapters 15 and 16)
- ✔ Graphics tools (see Part V)

Keep your bearings straight

A powerful but confusing capability in InDesign is something called a control point. InDesign lets you work with objects from nine different reference points — any of the four corners, the middle of any of the four sides, or the center — such as when positioning the object precisely or rotating the object. You choose the active reference point, or *control point,* in the Control panel or Transform panel, using the grid of nine points arranged in a square.

By default, InDesign uses the central reference point as the control point, which is great for rotating an object, but can lead to confusion when you enter in the X and Y coordinates to place it precisely. That's because most people use the upper-left corner of an object when specifying its coordinates, not the center of the object. Be sure to change the control point to the upper-left reference point whenever entering X and Y coordinates in the Control or Transform panels.

How do you change the control point? That's easy: Just click the desired reference point in that preview grid. The control point will be black, whereas the other reference points will be white.

Choosing the right tools for the job

Depending on what you're trying to do with InDesign at any given moment, you may or may not immediately know which tool to use. If, for example, you maintain fairly precise layout standards throughout a document, using master pages is the way to keep your work in order. Using styles is the best solution if you want to apply standard character and paragraph formatting throughout a document. When you work with one-of-a-kind documents, on the other hand, it doesn't make much sense to spend time designing master pages and styles — it's easier just to format elements as you create them.

For example, you can create *drop caps* (large initial letters set into a paragraph of type, like the drop cap that starts each chapter in this book) as a character option in the Character panel, or you can create a *paragraph style* (formatting that you can apply to whole paragraphs, ensuring that the same formatting is applied each time) that contains the drop-cap settings, and then apply that style to the paragraph containing the drop cap. Which method you choose depends on the complexity of your document and how often you need to perform the action. The more often you find yourself taking a set of steps, the more often you should use a global tool (like character and paragraph styles) to accomplish the task.

Fortunately, you don't need to choose between global and local tools while you're in the middle of designing a document. You can always create styles from existing formatting later. You can also add elements to a master page if you start to notice that you need them to appear on every page.

What to do when you make a mistake

InDesign is a very forgiving program. If you make a mistake, change your mind, or work yourself into a complete mess, you don't have to remain in your predicament or save your work. InDesign offers several escape routes. You can

✔ **Undo your last action by choosing Edit⇨Undo or pressing ⌘+Z or Ctrl+Z.** (Some actions, particularly actions such as scrolling that do not affect any items or the underlying document structure, cannot be undone.) You can undo multiple actions in the reverse order in which they were done by repeatedly choosing Edit⇨Undo or pressing ⌘+Z or Ctrl+Z; each time you undo, the previous action is undone.

✔ **Redo an action you've undone by choosing Edit⇨Redo or pressing Shift+⌘+Z or Ctrl+Shift+Z.** Alternatively, choosing Undo and Redo is a handy way of seeing a before/after view of a particular change. As with undo, you can redo multiple undone actions in the reverse of the order in which they were undone.

Specifying measurement values

Another situation in which you can choose between local or global controls is specifying measurement values. Regardless of the *default measurement unit* you set (that is, the measurement unit that appears in all dialog boxes and panels), you can use any unit when entering measurements in an InDesign dialog box. For example, if the default measurement is picas, but you're new to publishing and are more comfortable with working in inches, go ahead and enter measurements in inches.

InDesign accepts any of the following codes for measurement units. Note that the *x* in the items listed below indicates where you specify the value, such as **2i** for 2 inches. It doesn't matter whether you put a space between the value and the code. Typing **2inch** and typing **2 inch** are the same as far as InDesign is concerned:

- ✔ *x*i or *x* inch or *x*" (for inches)
- ✔ *x*p (for picas)
- ✔ *x*pt or 0p*x* (for points)
- ✔ *x*c (for ciceros)
- ✔ *x*ag (for agates)
- ✔ *x*cm (for centimeters)
- ✔ *x*mm (for millimeters)

The ability to specify measurements in agates is new to InDesign CS3. Agates are typically used in newspaper publishing.

You can enter fractional picas in two ways: in decimal format (as in **8.5p**) and in picas and points (as in **8p6**). Either of these settings results in a measurement of 8½ picas (there are 12 points in a pica).

Basic InDesign Vocabulary

Not too long ago, only a few publishing professionals knew — or cared about — what the words *pica, kerning, crop,* and *color model* meant. Today, these words are becoming commonplace because almost everyone who wants to produce a nice-looking report, a simple newsletter, or a magazine encounters these terms in the menus and manuals of their layout programs. Occasionally, the terms are used incorrectly or are replaced with general terms to make nonprofessional users feel less threatened, but that substitution ends up confusing professional printers, people who work in service bureaus, and Internet service providers. Throughout this book, I define other publishing terms as they come up.

Altered keystrokes: Revised shortcuts

InDesign CS3 has changed a few shortcuts that users of previous versions of InDesign should know, so they can adapt accordingly:

- Type⇨Paragraph Styles: The new shortcut is ⌘+F11 on the Mac, but the old shortcut of F11 still works (though the Mac OS X's Exposé program also uses this shortcut and thus may appear instead). In Windows, the shortcut remains F11, but Ctrl+F11 also works.

- Type⇨Character Styles: The new shortcut is Shift+⌘+F11 on the Mac, but the old shortcut of Shift+F11 still works. In Windows, the shortcut remains Shift+F11, but Ctrl+Shift+F11 also works.

- Type⇨Paragraph: The new Windows shortcut is now Ctrl+Alt+T, no longer Ctrl+M, to match the Mac's Option+⌘+T. Adobe let Ctrl+Alt+T work as an alternative in InDesign CS2; now the menu has changed to make Ctrl+Alt+T the official shortcut. But the old Ctrl+M continues to work if you want to still use it.

- View⇨Show/Hide Frame Edges: The new shortcut for the Mac only is Control+⌘+H. The Windows shortcut remains Ctrl+H.

- View⇨Display Performance⇨Fast Display: The new shortcut is Option+Shift+⌘+Z or Ctrl+Alt+Z, replacing Shift+⌘+0 or Ctrl+Shift+0.

- View⇨Display Performance⇨High Quality Display: The new shortcut, for the Mac only, is Control+Option+⌘+H. The Windows shortcut remains Ctrl+Alt+H.

- Window⇨Effects: The new shortcut to the renamed Transparency panel is Shift+⌘+F10 on the Mac, but the old shortcut of Shift+F10 still works. In Windows, the shortcut remains Shift+F10, but Ctrl+Shift+F10 also works.

- Window⇨Pages: The new shortcut is ⌘+F12 on the Mac, but the old shortcut of F12 still works. In Windows, the shortcut remains F12, but Ctrl+F12 also works.

- Window⇨Stroke: The new shortcut is ⌘+F10 on the Mac, but the old shortcut of F10 still works. In Windows, the shortcut remains F10, but Ctrl+F10 also works.

For consistency, this book uses the new shortcut for both Mac and Windows for the new shortcuts involving the F10, F11, and F12 keys, such as ⌘+F10 and Ctrl+F10 for opening the Stroke panel. They changed to accommodate Mac OS X's Exposé program, which uses the F10, F11, and F12 keys in its shortcuts, causing it to launch when InDesign users entered shortcuts using them. The new InDesign shortcuts don't step on Exposé's toes.

New shortcuts include the following:

- Type⇨Glyphs: Option+Shift+F11 or Alt+Shift+F11.

- Type⇨Insert Special Character⇨Quotation Marks⇨Straight Double Quotation Marks: Command+Shift+' or Alt+Shift+'.

- Type⇨Insert Special Character⇨Quotation Marks⇨Straight Single Quotation Mark (Apostrophe): Command+' or Alt+'.

- Notes⇨Notes Mode: ⌘+F8 or Ctrl+F8.

- Window⇨Automation⇨Scripts: Option+⌘+F11 or Ctrl+Alt+F11.

Like all great human endeavors, InDesign comes with its own terminology, much of it adopted from other Adobe products. Some general terms to know include the following:

- ✔ **Frame:** The container for an object. A frame can hold text, a graphic, or a color fill.
- ✔ **Link:** The connection to a file that you import, or *place* (defined below), into an InDesign document. The link contains the file's location and its last modification date and time. A link can reference any graphics or text file that you have imported into a layout. InDesign can notify you when a source text or graphics file has changed so you can choose whether to update the version in your layout.
- ✔ **Package:** The collection of all files needed to deliver a layout for printing.
- ✔ **PDF:** The Adobe Portable Document Format, which has become the standard for sharing electronic documents. No matter what kind of computer it is viewed on (Windows, Macintosh, Palm, or Unix), a PDF document displays the original document's typography, graphics representation, and layout. With InDesign, you can place PDF files as if they were graphics, and you can also export its InDesign pages to PDF format.
- ✔ **Place:** To import a graphics or text file.
- ✔ **Plug-in:** A piece of software that loads into, and becomes part of, InDesign to add capabilities to the program.
- ✔ **Stroke:** The outline of an object (whether a graphic, line, or individual text characters) or frame.
- ✔ **Thread:** The connections between text frames that let a story flow from one frame to another.

Discovering the Document Window

In InDesign, you spend lots of time working in document windows — the "containers" for your documents. Each document, regardless of its size, is contained within its own document window.

The best way to get familiar with the InDesign document window is by opening a blank document. Simply choosing File➪New➪Document, or pressing ⌘+N or Ctrl+N, and clicking OK opens a new document window. Don't worry about the settings for now — just explore.

Figure 1-1 shows all the standard elements of a new document window. I won't bore you by covering interface elements that are standard to all programs. Instead, the rest of this section focuses on InDesign-specific elements.

Control panel

Tools dock

Tools panel

Reference points   Restore button

Close button   Minimize button   Title bar

Zero point (ruler origin)   Rulers

Panel flyout menu

Main dock

Panel tab

Panel

Panel group
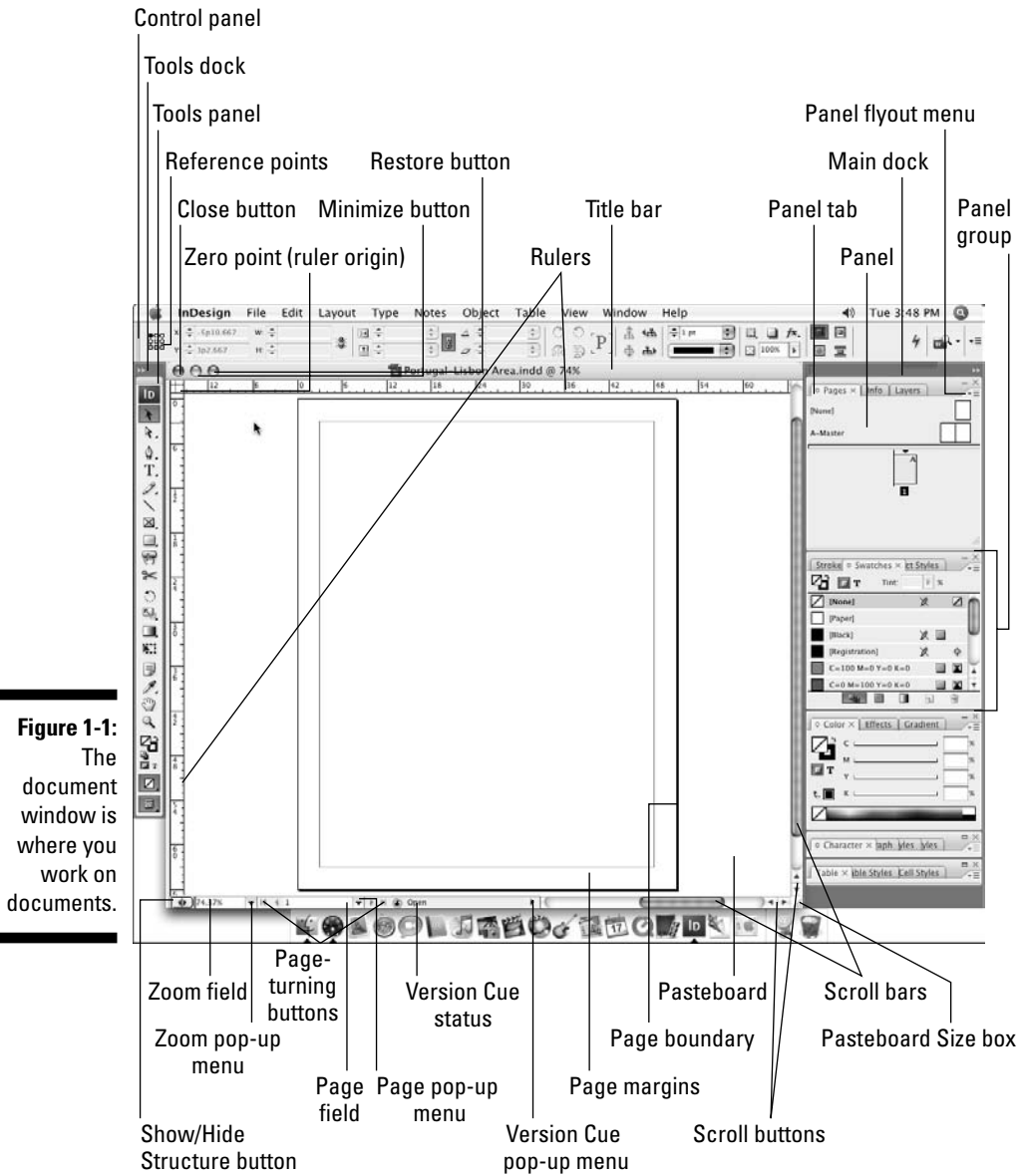
Figure 1-1:
The document window is where you work on documents.

Zoom field

Page-turning buttons

Version Cue status

Pasteboard

Scroll bars

Zoom pop-up menu

Page boundary

Pasteboard Size box

Page field   Page pop-up menu

Page margins

Show/Hide Structure button

Version Cue pop-up menu

Scroll buttons

The Version Cue pop-up menu lets you see the current status of a document in a shared workgroup setup. This is an expert feature you can ignore.

Rulers

Document windows display a horizontal ruler across the top and a vertical ruler down the left side. As shown in Figure 1-1, the horizontal ruler measures from the top-left corner of the page across the entire spread, and the vertical ruler measures from the top to the bottom of the current page. These rulers are handy for judging the size and placement of objects on a page. Even experienced designers often use the rulers while they experiment with a design.

Both rulers display increments in picas unless you change the measurement system for each ruler in the Units & Increments pane of the Preferences dialog box. Choose InDesign⇨Preferences⇨Units & Increments or press ⌘+K on the Mac, or choose Edit⇨Preferences⇨Units & Increments or press Ctrl+K in Windows, to open the Preferences dialog box. Your choices include inches, picas, points, decimal inches, ciceros, agates, millimeters, and centimeters. If you change the ruler measurement system when no documents are open, the rulers in all new documents will use the measurement system you selected. If a document is open when you make the change, the rulers are changed only in that document.

You can also create your own measurement system by choosing Custom. Most people should ignore this option, but sometimes it can make sense, such as setting the ruler to match the line spacing, so you can measure number of lines in your ruler.

If your computer has a small monitor and the rulers start to get in your way, you can hide them by choosing View⇨Hide Rulers or by pressing ⌘+R or Ctrl+R.

Zero point

The point where the rulers intersect in the upper-left corner of the page is called the *zero point.* This is the starting place for all horizontal and vertical measurements. If you need to place items in relation to another spot on the page (for example, from the center of a spread rather than from the left-hand page), you can move the zero point by clicking and dragging it to a new location. Notice that the X: and Y: values in the Control panel update as you drag the zero point so you can place it precisely. If you change the zero point, it changes for all pages or spreads in the document. You can reset the zero point to the upper-left corner of the left-most page by double-clicking the intersection of the rulers in the upper-left corner.

If you move the zero point, all the objects on the page display new X: and Y: values even though they haven't actually moved. Objects above or to the left of the zero point will show negative X: and Y: values, and the X: and Y: values of other objects will not relate to their actual position on the page or spread.

You can lock the ruler origin (the zero point), making it more difficult to accidentally change it. Control+click or right-click the ruler origin and choose Lock Zero Point from the menu that appears. (The Unlock Zero Point command is right there as well, so you can just as easily unlock it.) Locking the zero point is a good idea because it will remind anyone working on your document that you prefer that they not fiddle with the zero point.

Pasteboard

The white area that surrounds the page is called the *pasteboard.* It is a workspace for temporarily storing objects. Above and below each page or spread is about an inch of pasteboard, and on the left and right a pasteboard space as wide as a page. For example, a spread of two 8-inch-wide pages will have 8 inches of pasteboard to the left and 8 inches of pasteboard to the right.

Pages and guides

Pages, which you can see onscreen surrounded by black outlines, reflect the page size you set up in the New Document dialog box (File➪New➪Document, or ⌘+N or Ctrl+N). If it looks like two or more pages are touching, you're looking at a *spread.*

InDesign uses nonprinting guides, lines that show you the position of margins and that help you position objects on the page. *Margins* are the spaces at the outside of the page, whereas *columns* are vertical spaces where text is supposed to go by default. Magenta lines across the top and bottom of each page show the document's top and bottom margins. Violet lines show left and right columns (for single-page documents) or inside and outside columns (for spreads).

You can change the location of margin and column guides by choosing Layout➪Margins and Columns. You can create additional guides — such as to help you visually align objects — by holding down your mouse button on the horizontal or vertical ruler and then dragging a guide into the position you want.

Zoom field and pop-up menu

At the lower-left corner of the document window dwells the Zoom field, which shows the current zoom percentage. You can type in a new value any time. Immediately to its right is the Zoom pop-up menu, which also lets you change the document's view. The view can be between 5 percent and 4,000 percent in 0.01-percent increments.

TIP

To change the view without taking your hands off the keyboard, press Option+⌘+5 or Ctrl+Alt+5, enter a new zoom value, and press Return or Enter. Or press ⌘+= or Ctrl+= to zoom in, or ⌘+– or Ctrl+– to zoom out.

Page controls

If you feel like flipping through pages of the document you are creating, InDesign makes it easy with page-turning buttons and the Page field and pop-up menu. Controls for entering prefixes for the page numbers of sections, and for indicating absolute page numbers in a document that contains multiple sections, are also handy. (An absolute page number indicates a page's position in the document, such as +1 for the first page, +2 for the second page, and so on.)

Next to the Zoom pop-up menu is a combined page-number field and pop-up menu encased by two sets of arrows. These arrows are page-turning buttons that take you to, from left to right, the first page, the previous page, the next page, and the last page. Just click an arrow to get where you want to go.

You can also jump directly to a specific page or master page. To jump to a specific page, highlight the current number in the page number field (by selecting it with your cursor, or by pressing ⌘+J or Ctrl+J), enter a new page number, and press Return or Enter. (To jump to a master page, select the Page Number field and enter the first few characters of the master page's name.)

Opening Multiple Document Windows

If you like to work on more than one project at once, you've come to the right program. InDesign lets you open several documents at once. It also lets you open multiple windows simultaneously for individual documents. A large monitor (or having multiple monitors connected) makes this multi-window feature even more useful. By opening multiple windows, you can

✔ **Display two (or more) different pages or spreads at once.** You still have to work on the documents one at a time, but no navigation is required — you have only to click within the appropriate window.

✔ **Display multiple magnifications of the same page.** For example, you can work on a detail at high magnification in one window and display the entire page — and see the results of your detail work — at actual size in another window.

✔ **Display a master page in one window and a document page based on that master page in another window.** When you change the master page, the change is reflected in the window in which the associated document page is displayed.

To open a new window for the active document, choose Window➪Arrange➪ New Window. The new window is displayed in front of the original window. To show both windows at once, choose Window➪Arrange➪Tile. When you choose the Tile command, all open windows are resized and displayed side by side. (If you choose Window➪Arrange➪Cascade, all open windows are displayed stacked and staggered on top of each other. The front-most document window is visible; the title bars of the other windows are visible above the front-most document.)

When multiple windows are open, you activate a window by clicking on a window's title bar or anywhere within the window. Also, the names of all open documents are displayed at the bottom of the Window menu. Choosing a document name from the Window menu brings that document to the front. If multiple windows are open for a particular document, each window is displayed (they're displayed in the order in which you created them) in the Window menu.

TIP

To close all windows for the currently displayed document, press Shift+⌘+W or Ctrl+Shift+W. To close all windows for all open documents, press Option+Shift+⌘+W or Ctrl+Alt+Shift+W.

Tooling around the Tools Panel

You can move the InDesign Tools panel — the control center for 32 of InDesign's 33 tools, as well as for 13 additional functions — by clicking and dragging it into position. The Tools panel usually appears to the left of a document (see Figure 1-2).

REMEMBER

The one tool not directly accessible from the Tools panel is the Marker tool. But you can switch to it from the Eyedropper tool by holding Option or Alt. (Chapter 7 explains its use.)

TIP

To discover each tool's "official" name, hover the mouse pointer over a tool for a few seconds, and a Tool Tip will appear, telling you the name of that tool. If the Tool Tips do not display, make sure that the Tool Tips pop-up menu is set to Normal or Fast in the Interface pane of the Preferences dialog box (choose InDesign➪Preferences➪Interface or press ⌘+K on the Mac, or choose Edit➪Preferences➪Interface or press Ctrl+K in Windows).

NEW FEATURE CS3

The Interface pane is new to InDesign CS3. In previous versions, the Tool Tips control was in the General pane of the Preferences dialog box.

InDesign gives you one — and only one — tool for each specific job. The Tools panel includes tools for creating and manipulating the objects that make up your designs. The tools in the Tools panel are similar to those in other Adobe products (such as Photoshop, Illustrator, and Dreamweaver). I cover what each tool does in the following sections.
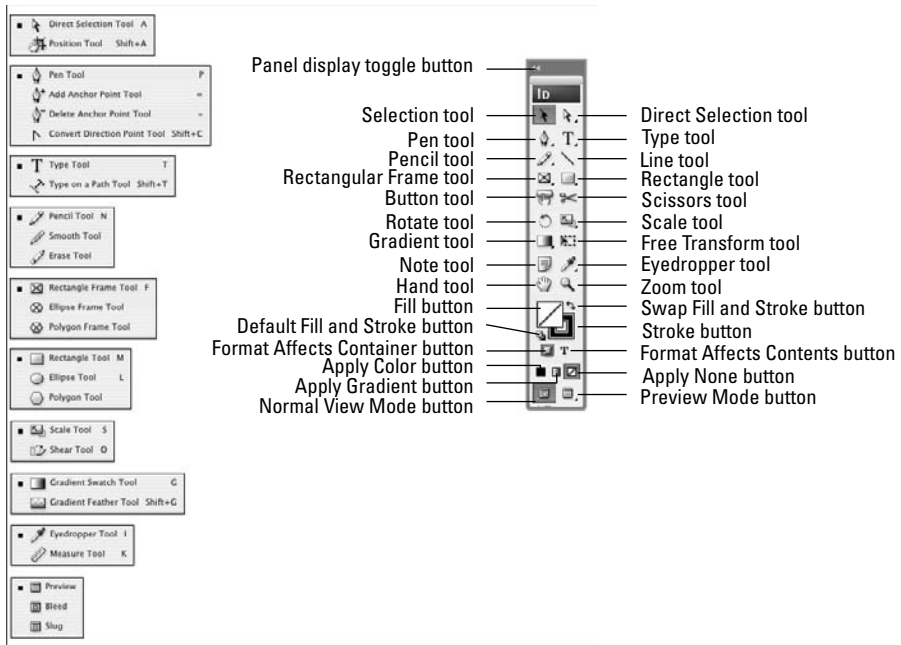
Figure 1-2: The InDesign Tools panel.

The small arrow in its lower-right corner of some tools is a pop-out menu indicator. A tool that displays this arrow is hiding one or more similar tools. To access these "hidden" tools, click and hold a tool that has the pop-out menu indicator, as shown in Figure 1-3. When the pop-out displays, click one of the new tools. (Figure 1-2 shows all the pop-out tools.)

You don't need to worry about all the tools, so I highlight just those that you'll need to know to start using InDesign. You'll likely come across the others as you work on specific tasks, so I cover those in the chapters that introduce those functions.

Using the Selection tools

To work with objects, you have to select them. InDesign provides three tools to do that, letting you select different aspects of objects.

Selection tool

This is perhaps the most-used tool in InDesign. With the Selection tool, you can select objects on the page and move or resize them. You might want to think of this tool as the Mover tool because it's the only tool that lets you drag objects around on-screen.

Figure 1-3:
If a small triangle appears in the lower-right corner of a tool, click and hold it to display pop-out tools.
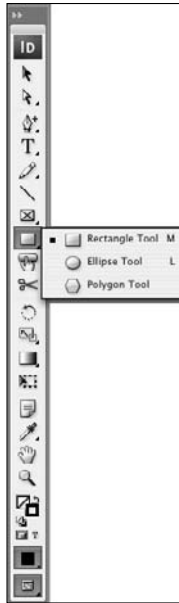
After you've selected the Selection tool, here's how it works:

✔ **To select any object on a document page,** click it. If you can't seem to select it, the object might be placed by a master page (a preformatted page used to format pages automatically), or the object might be behind another object.

✔ **To select an object placed by a master page,** press Shift+⌘ or Ctrl+Shift while you click.

✔ **To select an object that is completely behind another object,** ⌘+click it or Ctrl+click it.

Direct Selection tool

The Direct Selection tool is what you use to work on the contents of a frame, not the frame itself. For example, you can use the Direct Selection tool to select individual handles on objects to reshape them, or to move graphics within their frames.

Here's how the Direct Selection tool works:

✔ **To select an object to reshape it,** click the object to display anchor points on the edges (the anchor points are hollow handles that you can select individually, as shown in Figure 1-4). You can drag the anchor points to reshape the object.

✔ **To select objects placed by a master page,** Shift+⌘+click or Ctrl+Shift+ click, as with the Selection tool. The Direct Selection tool lets you easily select objects behind other objects and select items within groups.

✔ **To move a graphic within its frame,** click inside the frame and drag the graphic.

✔ **To move a frame but leave the graphic in place,** click an edge of the frame and drag it.

Figure 1-4:
Reshape an
item with
the Direct
Selection
tool by
clicking and
dragging an
anchor
point.
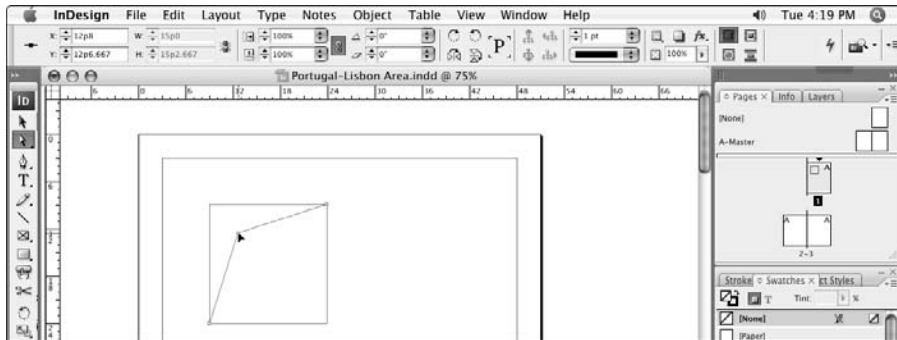
Position tool

Meant to mimic PageMaker's Crop tool to help former PageMaker users adjust to InDesign, the Position tool, which you access from the pop-out menu in the Direct Selection tool, combines some aspects of the Selection tool with some aspects of the Direct Selection tool:

✔ As with the Selection tool, you can resize an object's frame by dragging its handles.

✔ As with the Direct Selection tool, you can click a graphic and reposition it within the frame by dragging — and that has the effect of cropping the graphic.

Using the Type tool

A very frequently used tool, the Type tool lets you enter, edit, and format text. The Type tool also lets you create rectangular text frames.

Here's how the Type tool works:

✔ **To create a rectangular text frame,** click and drag; hold the Shift key to create a perfect square.

✔ **To begin typing or editing text,** click in a text frame or in any empty
frame and type away.

I explain stories and threaded text frames in Chapter 12.

Using the object-creation tools

InDesign has a bunch of tools for creating shapes. Part V covers them in more
depth, but you should know about a few of them now because they create
objects that can contain either text or graphics. Plus, you can also use them
to draw your own shapes that you then color or otherwise embellish in your
layout.

Pen tool

With the Pen tool, you can create simple illustrations. You use the Pen tool,
which is modeled after the pen tools in Illustrator and Photoshop, to create
paths (both open, such as lines, and closed, such as shapes) consisting of
straight and curved segments. Give it a try — it's fun!

Here's how the Pen tool works:

✔ **To create straight lines,** click to establish an anchor point, and then move
the mouse to the next location, click again, and so on. To move an anchor
point after clicking, press the spacebar and drag the anchor point.

✔ **To create curved lines,** click and drag, and then release the mouse
button to end the segment.

✔ **To close a path and create a frame,** click the first anchor point created
(the hollow one).

✔ **To leave a path open and create a line,** ⌘+click or Ctrl+click away from
the path or select another tool.

Type tool

The Type tool lets you draw rectangular text frames, as well as type text
inside them.

Line tool

The Line tool lets you draw freestanding lines (paths) on your page. After
selecting this tool, simply click and drag the mouse to draw the line. Holding
the Shift key while you click and drag constrains the line angle to 45-degree
increments, which is useful for creating straight horizontal and vertical lines.

Frame and shape tools

InDesign has three frame tools — Rectangle Frame, Ellipse Frame, and Polygon Frame — and three shape tools — Rectangle, Ellipse, and Polygon. The frame and shape tools are redundant because both frames and shapes can hold text or graphics or be empty.

Because the frame and shape tools really do the same thing, you might use the frame tool when creating frames that will have their content added later. Why? Because they display with a big X through them, making them easier to spot when looking for frames to fill. The shape tools create frames without that X, so it's easier to overlook them.

To create a rectangle or ellipse, choose the appropriate tool, click somewhere in the document window, and drag the mouse to another location. The rectangle or ellipse fills the area. But creating a polygon works differently:

1. **Double-click the Polygon or Polygon Frame tool to display the Polygon Settings dialog box, shown in Figure 1-5.**

2. **Enter a value between 3 and 100 in the Number of Sides field to specify the number of sides on your polygon.**

3. **To create a star shape, use the Star Inset field to specify the size of the spikes.**

   The percent value specifies the distance between the polygon's bounding box and the insides of the spikes (for example, entering **50%** creates spikes that are halfway between the bounding box and the center of the polygon).

4. **Click OK to close the Polygon Settings dialog box.**

   The settings are saved with the active document for the next time you use the Polygon or Polygon Frame tool.

5. **Click and drag to create the polygon, using the rulers or the Transform panel or Control panel to judge the size and placement.**

   To create a symmetrical polygon in which all the sides are the same size, press the Shift key while you click and drag the Polygon or Polygon Frame tool.

Using the navigation tools

Several tools help you navigate your document, which means moving around your pages, moving your pages around the screen, and changing the degree of magnification to see just part of a page or to see several pages at once.

Hand tool

The Hand tool lets you move a page around to view different portions of it or another page entirely. After selecting the Hand tool, click and drag in any direction. You can access the Hand tool temporarily without actually switching tools by pressing Option+spacebar or Alt+Spacebar.

Zoom tool

With the Zoom tool, you increase and decrease the document view scale. You can highlight a specific area on a page to change its view or you can click on-screen to change the view scale within InDesign's preset increments, which is the same as pressing ⌘+= or Ctrl+= to zoom in.

View buttons

The very bottom of the Tools panel has two view buttons: Normal View Mode and Preview Mode. The first shows the document's pasteboard, margins, and guidelines; the second hides those so you can get a better idea of how the document will look when it's printed or saved as a PDF.

A pop-up menu in the Preview Mode button has two preview options: Bleed mode and Slug mode. Bleed mode shows any objects that bleed (extend) beyond the page boundaries, whereas Slug mode shows the space reserved for information such as crop marks and color separation names used in final output. You can read more about these in Chapter 3. You set these options when you create new documents or by choosing File⇨Document Setup.

Using contextual menus

InDesign's contextual menu interface element is very useful. By Ctrl+clicking or right-clicking the document, an object, elements listed in a panel (such as a list of files or styles), the rulers, and so on, you can display a menu of options for modifying whatever it is you clicked. InDesign provides a lot of options this way, and it is often easier to use the contextual menus to access InDesign functions than to hunt through the many regular menu options and panels.

Working with Panels, Docks, and Workspaces

InDesign has so many controls and features that its designers have long ago stopped relying on menu commands to access them all. Instead, most of InDesign's features are presented as sort of miniature dialog boxes, called *panels*, that are "windows" of readily accessible options to consider when working in InDesign.

Working with panels

Panels provide an interactive method of working with features, one that lets you access the controls quickly. In many cases, panels offer the only method for performing many tasks. Figure 1-1 shows the panels that appear on-screen by default. Note that you can access all panels — except Quick Apply and Tabs — via the Window menu, whether or not the panel is displayed on-screen at the moment.

Panels typically have two — but sometimes three — controls:

- ✔ All panels but the Tools, Attributes, Script Label, and Command Bar panels have a flyout menu (formerly called the palette menu), which provides a pop-up menu of controls relevant to that panel. Figure 1-6 shows an example of a flyout menu.

- ✔ Any active panel — meaning it is displayed in front of any others in its panel group, so you can actually modify its settings — has a close control to remove the panel from the panel group. This is not a way to switch to another panel in that panel group — to do that, just click the tab of the panel you want to work with. (If you remove a panel by mistake, go to the Window menu to open it again.)

✔ *Some* panels have an expand/collapse control. Click the control to show more or fewer options (if all options are displayed, clicking the control will shorten the panel and hide some of the advanced options; if only the basic options are displayed, clicking the control lengthens the panel and show all the options.) Figure 1-7 shows examples of collapsed and expanded panels.
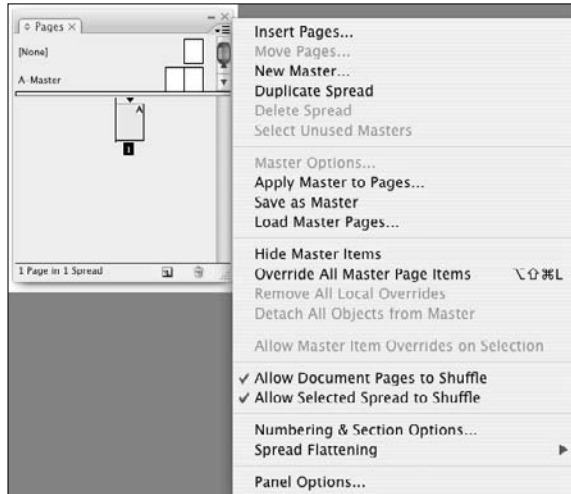
Figure 1-6: An sample flyout menu (for the Pages panel).
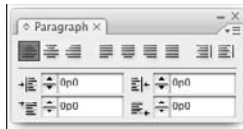
Figure 1-7: An example of a panel collapsed (top) and expanded (bottom).
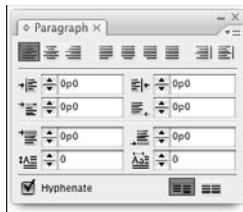
InDesign CS3 has seriously revamped the floating palettes that give you quick access to so many InDesign features. In previous versions of InDesign, these floating palettes contained one or more tabbed panes, and you could group and separate most of them as you preferred. What used to be called a pane is now called a *panel*. Panels now also have a consistent appearance: The tab is always on top, not either on the top or at left depending on whether it was free-floating or docked to the side of your monitor. Like the panes of yore, panels can be combined and separated into groups.

Adobe has also changed how panels are arranged on screen. By default, InDesign CS3 comes with two docks, one that holds only the Tools panel, and one that holds all the other panels, which I call the main dock. (Well, almost. The Control panel also displays separately, though it's not in a dock, just by itself at the top of the screen unless you move it.) Note that the main dock cannot be moved from the right side of the screen.

To better suit your working style, you can drag panels by their tabs to move them from one panel group to another, drag them out of a dock so they are free-floating, or drag them into a dock so they are no longer free-floating. The new dock feature lets you keep panel groups in one contained area, which helps keep the interface from getting too cluttered. But you're not forced to work this way: You can still drag panels outside the main dock so they are free-floating on screen.

Not all panels display in the main dock; less-used panels such as Data Merge will show up in a free-floating panel group when you open it via the Window menu. Of course, you can always add such panels to the main dock if you use them a lot.

All but four panels have a tab, which contains its name, to help you select the desired panel without having to go to the Window menu. To quickly select a panel, just click its tab. The four special panels (without tabs) are the Tools, Control, Command Toolbar, and Quick Apply panels. Unlike the rest of InDesign's panels, they can't be grouped with other panels, so there's no need for a tab to select them. (And for some reason, the Tools panel resides in a dock of its own, whereas the other three do not.)

When a panel is active, its controls have the following characteristics:

- ✔ **To display and select an option,** click a pop-up menu or an iconic button; the changes take effect immediately.

- ✔ **To place a new value in a field,** highlight the value that's already in the field and enter the new value. Note that fields accept values in all supported measurement systems, as described earlier in this chapter. To implement the new value, press Shift+Return or Shift+Enter. To get out of a field you've modified, leaving the object unchanged, press Esc.

- ✔ **To increase or decrease the value in the field,** use the clickable up and down arrows where available.

- ✔ **To use math to perform changes,** enter calculations in the field. You can add, subtract, multiply, and divide values in fields by using the following operators: +, –, * (multiply), and / (divide). For example, to reduce the width of a frame by half, type **/2** after the current value in the Width field. Or, to increase the length of a line by 6 points, you can type **+6** next to the current value in the Length field. You can also use percentages in fields, such 50%, which adjusts the current value by that percentage.

You can tell that the developers of InDesign have a passion for panels. Because there are so many of them, you might want to consider hooking up a second monitor for displaying them. As with the tools, if you make sure Tool Tips are enabled in the Interface panel of the Preferences dialog box (choose InDesign⇨Preferences⇨Interface or press ⌘+K on the Mac, or choose Edit⇨Preferences⇨Interface or Ctrl+K in Windows), you'll get some ideas as to what the panel iconic buttons and fields do.

InDesign CS3 adds the Assignments panel, which provides access to the optional InCopy CS3 program's features; these expert features are beyond the scope of this book. InDesign CS3 also adds the Cell Styles and Table Styles panels, which provide additional control over table formatting, as covered in Chapter 20. The new Notes panel lets you insert nonprinting reminders in your text, as explained in Chapter 13.

If panels are getting in your way, you can make them all disappear by pressing Tab — as long as the Type tool is not active and the text cursor is active within a text frame, of course. Press Tab to get your panels back.

Working with docks

Docks have controls to collapse and expand them — a new approach in InDesign CS3. Click the double-arrow iconic button at a dock's upper corner to collapse or expand the dock; you can also click the dark depression at the top of the main dock to collapse it. The main dock also can be resized by dragging the resize handle. Figure 1-8 shows the dock controls and what they look like when expanded and collapsed.

Working with workspaces

Although you can rearrange InDesign's panels to suit your needs, doing this again and again as you switch from one task to another can be a real chore. For example, you may open several of the table- and text-oriented panels when working on text, but then close them and open the graphics- and positioning-oriented panels when refining layout placement. That's why InDesign lets you create workspaces, which are essentially memorized panel collections. Display the panels you want, where you want them, and create a new workspace by choosing Window⇨Workspace⇨Save Workspace. Give the workspace a name that makes sense, such as Text Panels. That workspace is now available via Window⇨Workspace⇨*workspace name,* automatically displaying just those saved panels in their saved locations.

Dock resize handle

Collapse Dock buttons Panel group close button

Main dock Panel group minimize button

Figure 1-8:
The dock
controls on
a normal
dock (left)
and how
docks
appear
when
collapsed
(middle) and
expanded
(right).

Flyout menu button

Flyout menu

Panel close button

Panel tab

Panel hide/show options button
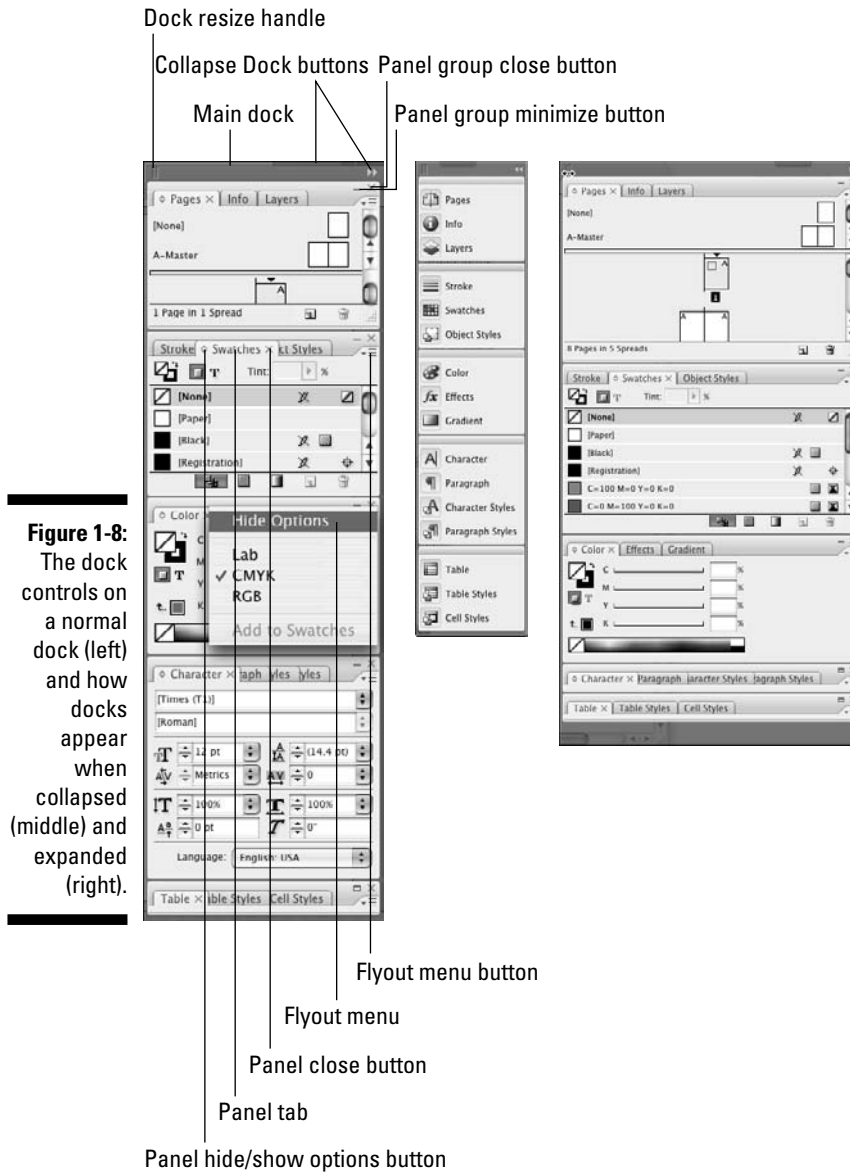
Surveying the Menus

Although InDesign relies heavily on its panels to present its rich capabilities,
it also uses traditional menus. In some cases, you can use menus instead of
panels; in others, you must use a menu command; in still others, you must
use a panel (such as for the data merge and object alignment features).

There are 10 menus in InDesign for Windows and 11 in InDesign for Macintosh:

- ✔ **InDesign (Macintosh only):** This menu contains the Preferences menu, where you set much of InDesign's behavioral defaults. You can also configure plug-ins here. Other functions are standard for all Mac programs, including hiding and quitting the program. Note that none of these menu items' functions are available in panels.

- ✔ **File:** This menu is where you open, create, close, save, export, and set up documents and books; where you import text and graphics; where you print documents and prepare them for commercial printing; and where you set basic user information. Note that none of these menu items' functions are available in panels.

- ✔ **Edit:** This menu lets you cut, copy, and paste elements; edit, spell-check, and do search-and-replace operations across entire stories and set up story for the InCopy add-on program; adjust and manage color settings; set up and change keyboard shortcuts and menu preferences; apply various styles to selected objects and text; and undo and redo recent actions. In Windows, you also set preferences and quit the program from this menu. Note that these menu items' functions, except for Quick Apply, are not available in panels.

- ✔ **Layout:** With this menu, you add, delete, rearrange, and navigate pages; change margins and guides; automatically resize a page and its objects; set up page numbering and sections; and create and format tables of contents. Note that these menu options' functions — except for the Pages, page-navigation, and Numbering & Section Options menus — are not available in panels.

- ✔ **Type:** With this menu, you adjust typographic attributes such as size and font, insert special characters, work with footnotes, add placeholder text; and control the on-screen display of special characters such as spaces. Note that the Find Font, Change Case, Type on a Path, Document Footnote Options, Text Variables, Insert Character, Fill with Placeholder text, and Show Hidden Characters menu items' functions are not available though panels.

- ✔ **Notes:** This new menu lets you insert and manage notes in your layout that do not print. This feature used to be available only if you bought the InCopy add-on software.

- ✔ **Object:** You use this menu to change the shape, size, location, and other attributes of objects such as frames and lines; to apply special effects to objects; to insert multimedia effects such as buttons; and control display redraw speed. Note that the Text Frame Options, Anchored Object, Corner Options, Clipping Path, and Convert Shape menu items' functions are not available through panels.

- ✔ **Table:** Use this menu to create, change, and format tables and cells. Note that this menu's functions are available through panels.

✔ **View:** This menu lets you control the display of your document, from zoom level to whether guides, rulers, and frame edges appear. Note that none of these menu items' functions, except for Screen Mode and the zoom controls, are available in panels.

✔ **Window:** This menu is where you manage the display of document windows and panels, as well as where you set up and work with workspaces. The window display and workspace functions are not available via panels.

✔ **Help:** Use this menu to access InDesign's help system and manage product activation and registration. In Windows, this menu also lets you manage plug-ins. Note that none of these menu items' functions are available in panels.

Among the new menu options in InDesign are InCopy and Menus in the Edit menu; Text Variables and Bulleted & Numbered Lists in the Type menu; Show/Hide Assigned Frames and Show/Hide Notes in the View menu; and Assignment and Notes in the Window menu. Also, the Effects option replaces the Drop Shadow and Feather options in the InDesign CS2 Object menu, and the Compound Paths menu item in InDesign CS3's Object menu used to be submenu items in the InDesign CS2 Paths menu.

Chapter 2

Making It Work Your Way

*I*t's safe to say that the nice people who created InDesign did their best: They put their heads together and made educated guesses about how most people would like to work and, in doing so, established defaults for various settings in the program. When you're just starting out, it's not a bad idea to simply stick with the default settings and see how they work for you. But after you become more familiar with InDesign and start putting it through its paces, you can change default preferences, views, and measurements, making them better suited to your way of working.

Preferences are program settings that dictate how InDesign will act in certain instances. InDesign provides extensive preference settings for everything from how objects appear on-screen to how text is managed for spelling and hyphenation.

Setting InDesign to work your way is easy, and this chapter explains how. And I promise not to numb you by covering every single option. Instead, I focus on just those preferences you are likely to change. As for the rest, feel free to explore their effects once you've gotten more comfortable using InDesign. (And in other chapters, I sometimes recommend specific preferences changes for the specific actions explained there.)

InDesign stores some preferences in the documents that govern how the document works as you work on it, or as it is transferred to other users. Other preference settings reside on your computer. Knowing how InDesign manages preferences is important if you share preferences with others or want to make sure that all your documents are updated with a new preference setting.

Setting Document Preferences

Preferences are settings that affect an entire document — such as what measurement system you use on rulers, what color the guides are, and whether substituted fonts are highlighted. To access these settings, open the Preferences dialog box by choosing InDesign⇨Preferences⇨*desired pane name* or pressing ⌘+K on the Mac, or by choosing Edit⇨Preferences⇨*desired pane name* or pressing Ctrl+K in Windows.

When you open the Preferences dialog box using the keyboard shortcut (⌘+K or Ctrl+K), InDesign automatically opens the General pane, as shown in Figure 2-1. To access one of the other 16 preferences panes, just click its name from the list at the left of the dialog box.

The Interface pane is new, taking settings formerly found in the General pane as well as adding collapse options for docks (sometimes called *icon panels* in the InDesign documentation and user interface). Likewise, the Clipboard Handling pane is new, taking settings formerly in the File Handling and Type panes. The Notes pane is completely new, providing controls over the non-printing notes feature that used to be available only if you bought the InCopy add-on program.

InDesign has two methods for changing preferences: You can change preferences when no documents are open to create new settings for all future documents, or you can change preferences for the active document, which affects only that document. Either way, after you've changed the desired preferences settings, just click OK to save those settings.

You cannot reverse changes to preferences by using the Undo command (Edit⇨Undo or ⌘+Z or Ctrl+Z). If you change your mind about a preference setting, reopen the Preferences dialog box and change the setting again.

Type preferences

The Type pane of the Preferences dialog box, shown in Figure 2-2, includes settings that affect character formats, controls whether you use typographer's quotes, and manages how text appears on-screen. You're likely to adjust these settings, so here's a quick review of the main ones:

✔ If Use Typographer's Quotes is checked, InDesign inserts the correct typographer's quotes (often called *curly quotes*) for the current language in use whenever you use quotation marks. For example, for U.S. English, InDesign inserts typographic single quotes (' ') or double quotes (" ") rather than straight quotes. For French, Catalan, Polish, and other languages, InDesign inserts guillemets (« »).

✔ Check Triple Click to Select a Line if you want to be able to select an entire line of text by triple-clicking it.

✔ When the Apply Leading to Entire Paragraph box is checked, changes to leading (the space between lines) apply to the entire paragraph, as opposed to the current line. In most cases, you want the leading to be applied to all paragraphs, so it's a good idea to check this box.

✔ Adjust Spacing Automatically When Cutting and Pasting Words, which is checked by default, will add or delete spaces around words when you cut and paste.

✔ When Font Preview Size is checked, menus let you preview how your font choice looks before you actually select it. The pop-up menu at right of the check box lets you select the size of the preview.

✔ The options in the Drag and Drop Text Editing section of the Type pane control whether you can drag and drop text selections within a document. By default, Enable in Story Editor is checked and Enable in Layout View is unchecked, which means that you can drag and drop text in the Story Editor but not when working on a layout. You'll probably want to check them both.
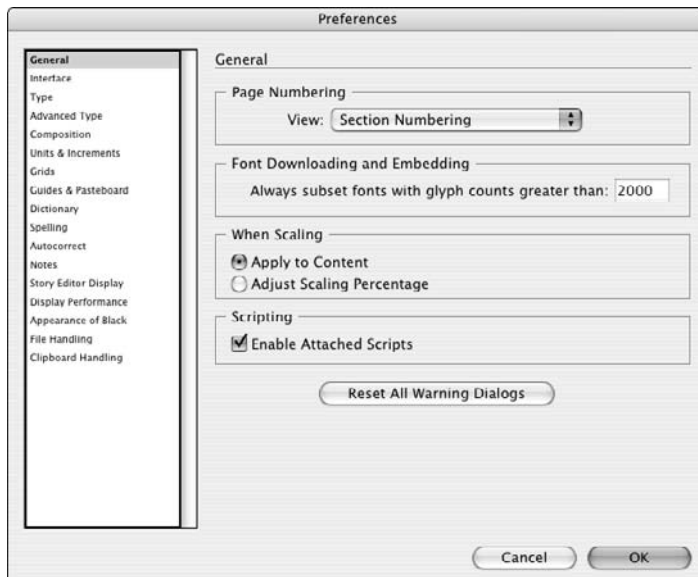
Figure 2-1:
The General pane of the Preferences dialog box.

Figure 2-2:
The Type
pane of the
Preferences
dialog box.
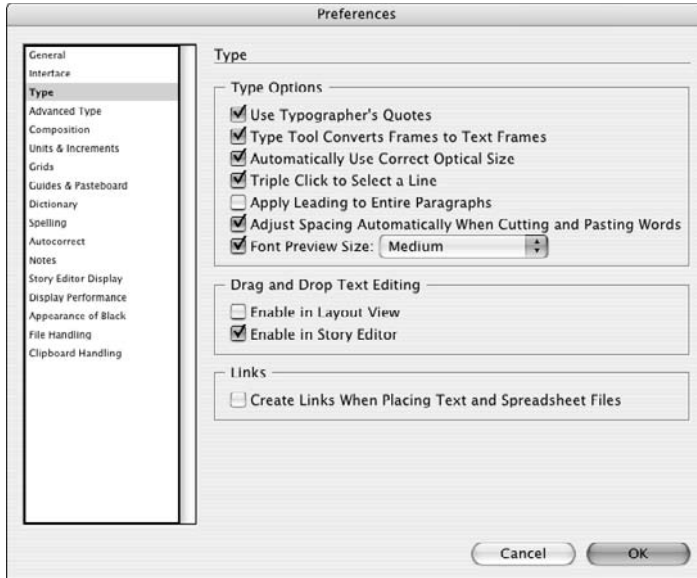
The Advanced Type pane includes additional typographic settings, as
Figure 2-3 shows.

Figure 2-3:
The
Advanced
Type pane
of the
Preferences
dialog box.
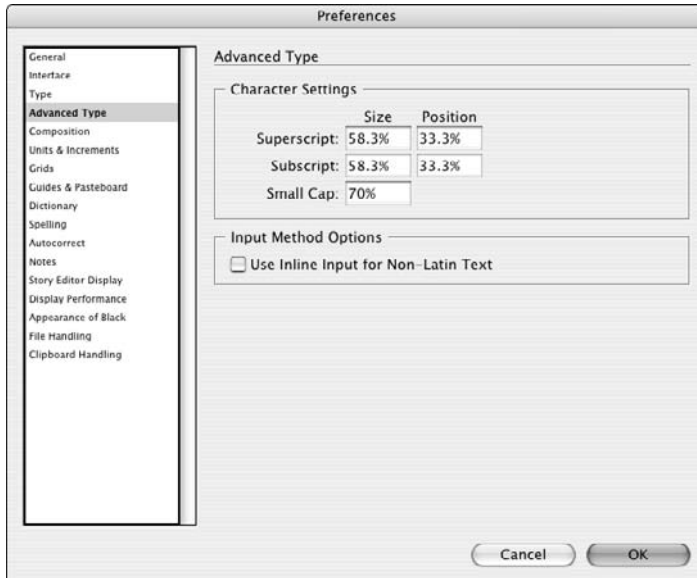
In the Character Settings section of the Advanced Type pane, you control precisely how superscript, subscript, and small-caps characters are placed and sized:

✏ The Size fields let you specify the percentages to which superscript and subscript characters are reduced (or even enlarged). The default is 58.3 percent, but you can enter a value between 1 and 200 percent. I prefer 60 or 65 percent, depending on the type size and font.

✏ The Position fields let you specify how much to shift superscript characters up and subscript characters down. The default is 33.3 percent, but you can enter a value between –500 and 500 percent. I prefer 30 percent for subscripts and 35 percent for superscripts. Note that negative values move text in the opposite directions: down for superscripts and up for subscripts. The percentage is relative to the top of a lowercase letter (the *x height*) for superscripts and to the baseline for subscripts.

✏ The Small Cap field lets you specify the scale of Small Caps characters in relation to the actual capital letters in the font. The default is 70 percent, but you can enter a value between 1 and 200 percent.

The Clipboard Preferences pane includes one text-oriented preference that used to be in the Type pane: Use the When Pasting Text and Tables from Other Applications setting to choose how formatting is handled when you paste textual objects from other applications. The default is Text Only, which means that you want copied text to assume the formatting of the destination location's text in InDesign. The All Information option retains the original formatting when you copy the text into InDesign.

Typographic terminology 101

Publishing tools like InDesign use specialized terms, some of which appear in the Preferences dialog box:

✏ **Baseline:** This term refers to the invisible line that text sits on in each line. Except for a few characters like *g* and *p* that poke below it, all characters rest on this baseline.

✏ **Kerning:** This refers to an adjustment of the space between two letters. You kern letters to accommodate their specific shapes. For example, you probably would use tighter kerning in the letter pair *to* than in *oo* because *to* looks better if the *o* fits partly under the cross of the *t*.

✏ **Leading:** This term, also called line spacing, refers to the space from one baseline to another.

✏ **Tracking:** Tracking determines the overall space between letters within a word.

Composition preferences

Preferences in the Composition pane, shown in Figure 2-4, do two things: highlight potential problems on-screen while you're working, and establish the behavior of text wrap in certain situations.
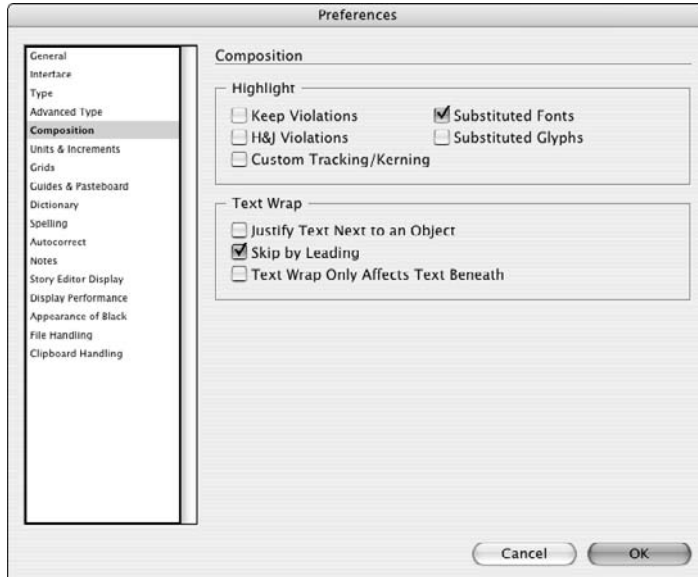
Highlighting potential problems

The Highlight check boxes control whether InDesign calls attention to possible typesetting problems by drawing a highlighter pen effect behind the text. All are unchecked by default unless indicated otherwise below:

✔ Keep Violations highlights the last line in a text frame when it cannot follow the rules specified in the Keep Options dialog box in the Paragraph panel's flyout menu (Type⇨Paragraph, or Option+⌘+T or Ctrl+Alt+T), as explained in Chapter 15. For example, if the Keep Options settings require at least three lines of text in the text frame, but only two lines fit and thus bump all the text in a frame to the next text frame in the chain, the Keep Options rules are violated, and the last line of text is highlighted.

✔ When H&J Violations is checked, InDesign uses three shades of yellow (the darker the shade, the worse the problem) to mark lines that might be too loose or too tight due to the combination of spacing and hyphenation settings. (H&J refers to hyphenation and justification.) Chapter 15 covers this, too.

✔ Custom Tracking/Kerning, if checked, highlights custom tracking and kerning (essentially, anywhere you overrode the defaults) in a bluish green. Chapter 16 covers kerning and tracking in more detail.

✔ Substituted Fonts, which is checked by default, uses pink highlights to indicate characters in fonts that are not available and thus for which InDesign has substituted a different font. For output purposes, it's important that you have the correct fonts, so you typically want to leave this checked.

✔ Substituted Glyphs highlights, in pink, any glyphs (special characters) that were substituted. This usually occurs when you have multiple versions of the same font, with different special characters in each version. For example, a file that uses the euro (€) currency symbol might have been created in the newest version of a font, but a copy editor working on the same file may have an older version of the font that is missing the euro symbol.

Setting text-wrap rules

The three options in the Text Wrap area affect how text flows (wraps) around images and other frames:

✔ Selecting the Justify Text Next to an Object check box overrides any local justification settings to make text wrapping around an object justified. That means the text will smoothly follow the object's shape, rather than keep any ragged margins that can make the wrap look strange. This option comes into play when you wrap ragged (left-aligned or right-aligned) text around objects.

✔ Skip by Leading, if checked, uses the text's leading to determine how much space follows an object around which text wraps. This effect is used only if you choose the Jump Object text-wrap option in the Text Wrap panel (Window⇨Text Wrap, or Option+⌘+W or Ctrl+Alt+W).

✔ Text Wrap Only Affects Text Beneath, if checked, causes only text below (behind) an object to wrap around that object.

Chapter 17 covers text wrap in detail.

Measurement preferences

The Units & Increments pane, shown in Figure 2-5, is where you choose the measurement systems for positioning items.
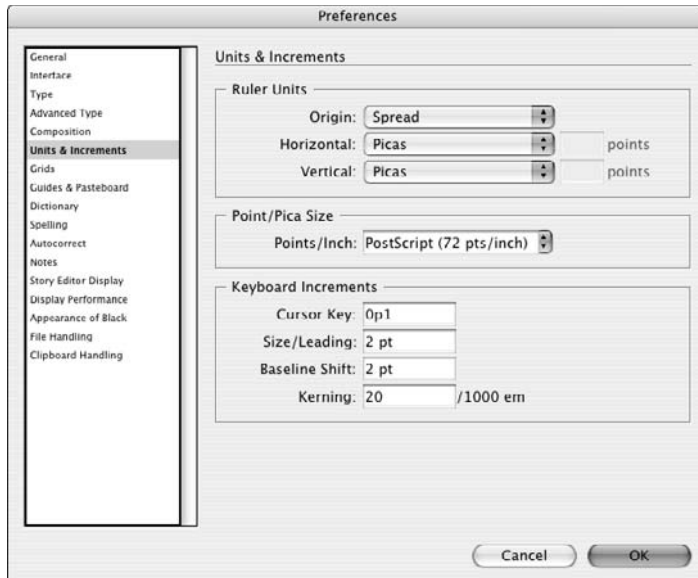
Figure 2-5:
The Units &
Increments
pane of the
Preferences
dialog box.

Ruler Units area

The Ruler Units area affects three things: the origin point (by page, by spread, or by the spine), the measurement system displayed on the horizontal and vertical rulers in the document window, and the default values in fields used for positioning objects.

The Origin pop-up menu determines the zero point (typically, the upper-left corner of the page) for object positions. If you choose Page, the positions of objects are relative to each page's upper-left corner. If you choose Spread, the positions of objects are relative to the current spread's upper-left corner. If you choose Spine, objects' positions are relative to the binding spine of each spread — the very top and center of where the two pages meet.

With the Vertical and Horizontal pop-up menus, you specify one measurement system for the horizontal ruler and measurements, and the same or different measurement system for the vertical ruler and measurements. For example, you might use points for horizontal measurements and inches for vertical measurements.

To specify the measurement systems you want to use, choose an option from the Horizontal pop-up menu and from the Vertical pop-up menu. You have the following options:

✔ **Points:** A typesetting measurement equal to $\frac{1}{72}$ of an inch (or $\frac{1}{12}$ of a pica). To enter values in points, type a **p** before the value or **pt** after the value (for example, **p6** or **6 pt**).

TIP

- ✔ **Picas:** A typesetting measurement equal to ⅙ of an inch. To enter values in picas, type a **p** after the value (for example, **6p**).

  You can combine measurements using both picas and points. Keeping in mind that 1 pica is equal to 12 points, you can enter 1½ picas as either **1.5p** or **1p6**.

- ✔ **Inches:** An English measurement system that is divided into 16ths. To enter values in inches, type **i**, **in**, **inch**, or **"** after the value. For example, **3i**, **3in**, **3 inch**, and **3"** are all read by InDesign as "3 inches."

- ✔ **Inches decimal:** Inches divided into 10ths on the ruler rather than 16ths. To enter values in inches decimal, include a decimal point as appropriate and type **i**, **in**, **inch**, or **"** after the value.

NEW FEATURE
CS3

- ✔ **Agates:** Typically used in newspapers, an agate is 1/14 of an inch, usually the depth of a line in the small type of classified ads, stock tables, and sports statistics boxes. To enter values in agates, type **ag** after the value. For example, **10ag**.

- ✔ **Millimeters:** A metric measurement that is 1/10 of a centimeter. To enter values in millimeters, type **mm** after the value. For example, **14mm**.

- ✔ **Centimeters:** A metric measurement that is about ⅓ of an inch. To enter values in centimeters, type **cm** after the value. For example, **2.3cm**.

- ✔ **Ciceros:** A European typesetting measurement that is slightly larger than a pica. To enter values in ciceros, type **c** after the value. For example, **2c**.

- ✔ **Custom:** This option lets you set a customer number of points as your measurement unit, placing a labeled tick mark at every point increment you specify. You get to customize the number of tick marks between the labeled marks by entering a value in the Points field. For example, if you enter **12** in the field, you get a tick mark at each pica because there are **12** points in a pica. A good way to use this is if you need to have the rulers show tick marks at whole-line increments; in that case, if your leading is 8 points, you'd set the Custom field to **8**.

Keyboard Increments area

This area lets you customize the way the keyboard arrow keys work. You can use the arrow keys to move selected objects right, left, up, or down. You can also use the arrow keys and other keyboard shortcuts to change some text formatting. The options are

- ✔ **Cursor Key field:** When you select an object with the Selection tool or the Direct Selection tool, you can move it up, down, left, or right by using the arrow keys on the keyboard. By default, the item moves 1 point with each key press. You can change the increment to a value between 0.001 and 8p4 (1.3888 inches). If you use a document grid, you might change the increment to match the grid lines.

- ✔ **Size/Leading field:** The value in this field specifies by how many points the leading or font size is increased or decreased when done with keyboard commands. You can enter a value between 0.001 and 100 (the default is 2).

- ✔ **Baseline Shift field:** To shift the baseline of highlighted text up or down, you can click in the Baseline Shift field on the Character panel, and then click the up or down arrow on the keyboard. The default for the Baseline Shift increment value is 2 points, which you can change to any value between 0.001 and 100.

- ✔ **Kerning field:** To kern text with keyboard commands, you position the cursor between two letters and then Option+press or Alt+press the right arrow button to increase kerning or the left arrow to decrease kerning. By default, each click changes kerning by $\frac{1}{50}$ of an em — shown on screen as 20/1000 em. You can change this value to anything between 1 and 100, in increments of $\frac{1}{1000}$ of an em. (An em is a space the width of a capital *M*, a commonly used space in professional typography.)

Document defaults

InDesign also lets you change the default page size, margins, and columns in new documents; the default attributes of guides; and the way layouts are adjusted. You don't modify these settings in the Preferences dialog box; instead, to modify document defaults, first make sure that no documents are open and then choose the following:

- ✔ **File⇨Document Setup (Option+⌘+P or Ctrl+Alt+P).** The Document Setup dialog box lets you change the default settings in the New Document dialog box for the Number of Pages, Page Size, Facing Pages, and Master Text Frame, as well as for bleeds and slugs if you click the More Options button.

- ✔ **Layout⇨Margins and Columns.** The Margins and Columns dialog box lets you change the default settings in the New Document dialog box for the Margins and Columns areas.

- ✔ **Layout⇨Ruler Guides.** This opens the Ruler Guides dialog box where you adjust the View Threshold and Color for all new guides.

- ✔ **Layout⇨Layout Adjustment.** The Layout Adjustment dialog box lets you resize entire layouts and modify how they are resized.

If you are unhappy with the preferences and defaults you have established, you can revert InDesign to all its default settings. To revert all preferences and defaults, press Control+Option+Shift+⌘ or Ctrl+Alt+Shift when launching InDesign.

Working with stored preferences

Some preferences in InDesign are stored in files that you can share with other users, so the preferences can be consistently used in a workgroup. These include keyboard shortcut sets, color swatch libraries, document setups, workspaces, and scripts.

Some of these stored preferences — such as document setups and printing setups — are called *presets,* and the files that store them reside in the Presets folder within the InDesign application folder. When you save a preset, InDesign automatically updates the presets file. You can then copy that preset file to another user's Presets folder.

To create presets, look for menu items with the word *preset* in them — examples are Adobe PDF Presets, Document Presets, and Print Presets in the File menu; and Transparency Flattener Presets in the Edit menu. Also look for the Save Preset option in some dialog boxes. To use a preset, look for a pop-up menu with the word *preset* in them in dialog boxes; for example, you would use the Document Preset pop-up menu in the New Document dialog box to create a new document using a specific preset's settings.

InDesign has other types of stored preferences whose settings are also stored in separate files, also stored in the Presets folder. But you won't see options labeled *Presets* in the InDesign user interface to work with them. These stored preferences include Keyboard Shortcuts, Menus, and Color Profiles options in the Edit menu and the Workspace option in the Window menu. You can share these settings by copying them to other users' Presets folders.

Another kind of preference is typically stored as part of a document: master pages, text variable, color swatches, and the various types of text, stroke, and object styles available through a series of panels. These preferences can be imported from other documents using the Load command in the various panels' flyout menus and in some dialog boxes. Most presets — such as document presets, print presets, trap presets, and Adobe PDF presets — can also be loaded and saved this same way. In addition, color swatches can be saved to files to be shared with other Adobe applications using a Save Swatches command in the Swatches panel's flyout menu.

Modifying Defaults for Text and Objects

When you create a new document, start typing, or create a new object, your work conforms to default settings. You can change these settings. For example, by default, a new document is always letter-sized, but if you design only posters, you can change the default.

You may need to work with InDesign for a while to figure out which settings you prefer. When you identify a problem — for example, you realize that you always end up changing the inset for text frames — jot down a note about it or close all documents right then. When no documents are open, change the setting for all future documents.

Text defaults

When you start typing in a new text frame, the text is formatted with default formats and attributes. You can also choose to show invisible characters such as spaces and tabs by default; otherwise, you need to manually activate character visibility in each text-heavy document. To modify text defaults:

✔ **Choose default options for character formats** such as Font Family, Font Size, and Leading from the Character panel. Choose Type➪Character (⌘+T or Ctrl+T).

✔ **Choose defaults for paragraph formats,** such as alignment, indents, spacing, and so on, from the Paragraph panel. Choose Type➪Paragraph (Option+⌘+T or Ctrl+Alt+T).

✔ **Choose defaults for the [Basic Paragraph] style,** which is what all unstyled imported text, as well as text entered in a new text frame in InDesign, will use. Choose Type➪Paragraph Styles (⌘+F11 or Ctrl+F11).

✔ **Activate Optical Margin Alignment.** Choose Type➪Story. This adjusts the left position of characters along the left margin to make the left edges look more pleasing, by letting the top of a *T*, for example, hang slightly to the left of the margin, even if that means the characters aren't strictly aligned. (Because Optical Margin Alignment works best for display type rather than body type, it's unlikely that you'll activate optical margin alignment as your default setting.)

✔ **Show Hidden Characters** is a good thing to activate if you always end up turning on Show Hidden Characters when you are editing a document. Choose Type➪Show Hidden Characters (⌘+Option+I or Ctrl+Alt+I). Hidden characters are spaces, tabs, and so forth that print "blank" but that you may want to see on-screen to make sure you have the right character in use. InDesign has a unique on-screen symbol for every kind of space, tab, indent-to-here, and other such "blank" characters.

Object defaults

When you create new objects, they're based on default settings. For example, you can specify how text wraps around objects. To modify object defaults, use the following commands:

✔ **Specify the default Columns, Inset Spacing, First Baseline, and Ignore Text Wrap settings** for new text frames using the Text Frame Options dialog box. Choose Object➪Text Frame Options (⌘+B or Ctrl+B).

✔ **Choose defaults for the [Normal Graphics Frame] and [Normal Text Frame] styles,** which are what all new frames created in InDesign will use. Choose Window➪Object Styles (⌘+F7 or Ctrl+F7).

✔ **Specify how text will wrap around all new objects.** Choose Window▷ Text Wrap (⌘+Option+W or Ctrl+Alt+W).

✔ **Choose a style for the corners of all new frames except those created with the Type tool.** Choose Object▷Corner Options (⌘+Option+R or Ctrl+Alt+R).

✔ **Specify the default attributes of clipping paths imported into graphics frames.** Choose Object▷Clipping Path.

✔ **Specify other default properties of objects.** For example, if all objects you create are stroked (framed), specify a weight in the Stroke panel. Choose Window▷Stroke (⌘+F10 or Ctrl+F10), Window▷Swatches (F5), Window▷Gradient (F6), or Window▷Attributes.

✔ **Specify the default number of sides and the inset for the first new polygon in a new document.** Double-click the Polygon or Polygon Frame tool to open the Polygon Settings dialog box (there is no menu command or keyboard shortcut).

Modifying Defaults for Views

You can also control which layout tools display by default. Selections in the View menu let you do this. If you prefer not to view the edges of frames, you can hide them by default. Or if you always want to start with a document-wide grid (see Chapter 11), you can show that by default. Other defaults you can modify in the View menu include

✔ **Show the links between text frames.** Choose View▷Show Text Threads (Option+⌘+Y or Ctrl+Alt+Y).

✔ **Hide the edges of frames.** Choose View▷Hide Frame Edges (Control+⌘+H or Ctrl+H).

The Mac shortcut for showing and hiding text frames has changed to Control+⌘+H in InDesign CS3, from just ⌘+H in previous versions. The Windows shortcut (Ctrl+H) is unchanged.

✔ **Hide the horizontal and vertical ruler.** Choose View▷Hide Rulers (⌘+R or Ctrl+R).

✔ **Hide margin, column, and layout guides.** View▷Grids & Guides▷Hide Guides (⌘+; [semicolon] or Ctrl+; [semicolon]).

✔ **Show the baseline grid established in the Grids pane of the Preferences dialog box.** Choose View▷Grids & Guides▷Show Baseline Grid (Option+ ⌘+' [apostrophe] or Ctrl+Alt+' [apostrophe]).

✔ **Show the document-wide grid established in the Grids pane of the Preferences dialog box.** Choose View▷Grids & Guides▷Show Document Grid (⌘+' [apostrophe] or Ctrl+' [apostrophe]).

InDesign has another place to set view settings: in the Pages panel's flyout menu, choose View➪Show/Hide Master Items. When you choose Show Master Items, any objects on the currently displayed document page's master page are displayed. When you choose Hide Master Items, master objects on the currently displayed page are hidden. This command is page-specific, so you can show or hide master objects on a page-by-page basis.

Adding Default Colors and Styles

If you are a creature of habit, you may find yourself creating the same colors, paragraph styles, character styles, and object styles over and over again. Save yourself some steps by creating these features when no documents are open; when you do so, the features will be available to all future documents.

To set up these often-used items, use the New command in the flyout menus for the following panels: Swatches (F5), Character Styles (Shift+⌘+F11 or Ctrl+Shift+F11), Paragraph Styles (⌘+F11 or Ctrl+F11), and Object Styles (⌘+F7 or Ctrl+F7). You can also use the flyout menus' Load commands to import colors and styles from existing documents instead of creating them from scratch.

Chapter 7 covers color swatches, Chapter 10 covers object styles, and Chapter 14 covers character and paragraph styles in more detail.

Part II

Document
Essentials

The 5th Wave   By Rich Tennant

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"Remember, your Elvis should appear bald and slightly hunched.
Nice Big Foot, Brad. Keep your two-headed animals in the
shadows and your alien spacecrafts crisp and defined."

In this part . . .

The reader sees your text and images, but as a layout artist, you know there's a lot more going on behind the scenes. Your documents contain all sorts of elements — the publishing equivalent of the girders and beams and so forth of a building — that are essential to delivering the final text and graphics. This part covers those document essentials, showing you how to work with the document files, pages, layers, templates, libraries, and sections — the basic organizing elements and containers. You'll also discover how to create colors that you can use over and over again.

Chapter 3

Opening and Saving Your Work

. . . .

. . . .

*Y*ou're eager to create a new document and get started with InDesign. So you launch InDesign, create or open a new document, and begin working. Right? Wrong, sort of. You can just plunge in, but you're best served if you have an idea before you start of what you want to accomplish. That way, you won't be staring at a blank screen with no brilliant ideas in mind.

After you have an idea of what you want to do, you need to create the document that will hold those brilliant ideas. InDesign lets you apply those ideas from the very start of creating the document, and also lets you make changes later on, as you refine your ideas.

This chapter shows you the basics of working with document files, from creating and opening them to saving them.

Setting Up a New Publication

After you launch InDesign, you have two options: You can choose File⇨Open (or press ⌘+O or Ctrl+O) to open a previously created document or template, or you can choose File⇨New⇨Document (or press ⌘+N or Ctrl+N) to create a new document.

Creating a new document is where all the fun is because you get to create something yourself, from scratch. Here's how to create a new document:

1. **Choose File⇨New⇨Document or press ⌘+N or Ctrl+N.**

   The New Document dialog box appears, as shown in Figure 3-1. It is here that you will have to make many up-front decisions about how you want your new document set up — including page size, number of pages, number of columns, and margin width. Although you're free to change your mind later, you'll save yourself time and potential headaches by sticking with the basic page parameters you establish in the New Document dialog box.

Figure 3-1: The New Document dialog box establishes the basic framework for your pages.
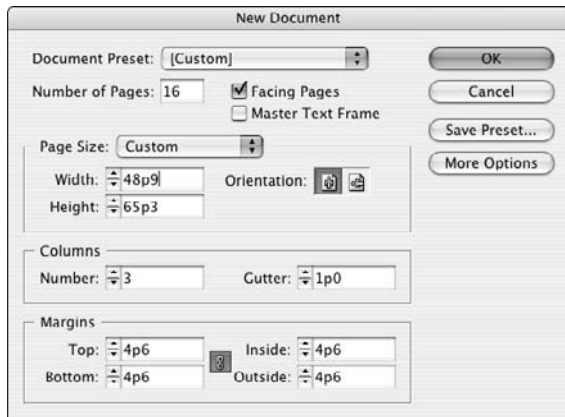
2. **If you know exactly how many pages your publication will have, enter the number in the Number of Pages field.**

   If you don't know for sure, you can always add or delete pages later. Just guesstimate: It's easy to add or delete pages later.

3. **Decide whether to lay out your documents in a spread or as separate pages.**

   • If you're creating a multi-page publication that will have a spine, such as a book, catalog, or magazine, select Facing Pages.

   • If you're creating a one-page document, such as a business card, an ad, or a poster, don't select Facing Pages.

   • Some publications, such as flip charts, presentations, and three-ring bound documents, have multiple pages but use only one side of the page. For such documents, don't check Facing Pages, either.

4. **If you want to flow text from page to page in a multi-page document, such as a book or a catalog, check Master Text Frame.**

   If you check this box, InDesign automatically adds a text frame to the document's master page and to all document pages based on this master page. Doing this saves you the work of creating a text frame on each page and manually threading text through each frame. (See Chapter 6 for more information about using master text frames.)

5. **In the Page Size area, you can choose one of the predefined sizes from the pop-up menu.**

6. **Specify margin values in the Margins area.**

   If Facing Pages is checked, Inside and Outside fields are available in the Margins area. Designers often specify larger inside margins for multi-page publications to accommodate the fold at the spine. If Facing Pages is not checked, Left and Right fields replace the Inside and Outside fields. You can also specify margin values by clicking the up/down arrows associated with the fields.

7. **To specify how many columns your pages have, enter a value in the Columns field.**

   You can also specify the number of columns by clicking the up/down arrows associated with the Column field.

8. **Specify a gutter distance (the gutter is the space between columns) in the Gutter field.**

   You can also specify a gutter width value by clicking the up/down arrows associated with the Gutter field.

9. **Click the More Options button to access the Bleed and Slug area of the New Document dialog box (refer to Figure 3-1 to see the Bleed and Slug area).**

   Clicking the More Options button provides options to set bleed and slug areas. (Note that the button then changes to Fewer Options.) A *bleed area* is a margin on the outside of the page for objects you want to extend past the edge of the page — you want them to extend at least $\frac{1}{8}$ inch so if there is any shifting of the paper during printing, there's no white space where the image should be (touching the edge of the page). The slug area is an area reserved for printing crop marks, color plate names, and other such printing information — some output devices will cut these off during printing unless a slug area is defined. For both bleed and slug areas, you can set the top, bottom, left, and right margins independently.

10. **Click OK to close the New Document dialog box.**

    Your new, blank document appears in a new document window. Figure 3-2 shows the window of a newly created document that uses the settings shown in Figure 3-1.

> **TIP**
>
> You can bypass the New Document dialog box by pressing Shift+⌘+N or Ctrl+Shift+N. When you use this method, the most recent settings in the New Document dialog box are used for the new document.

Opening documents

Opening documents with InDesign is pretty much the same as opening documents with any program. Simply choose File➪Open (or press ⌘+O or Ctrl+O), select the document you want to work on, and then click the Open button. But InDesign offers a few options for opening documents that you don't find in every program. For example, you can

- ✔ **Open more than one document at a time.**

- ✔ **Open a copy of a document instead of the original.** This keeps the original file from being overwritten accidentally — very helpful if you're making several variations of one document.

- ✔ **Open a template under its own name.** This makes editing templates easier than it is with other programs, specifically QuarkXPress.

- ✔ **Open documents created with Versions 6.0, 6.5, and 7.0 of PageMaker and Versions 3.3, 4.0, and 4.1 of both QuarkXPress and QuarkXPress Passport.**
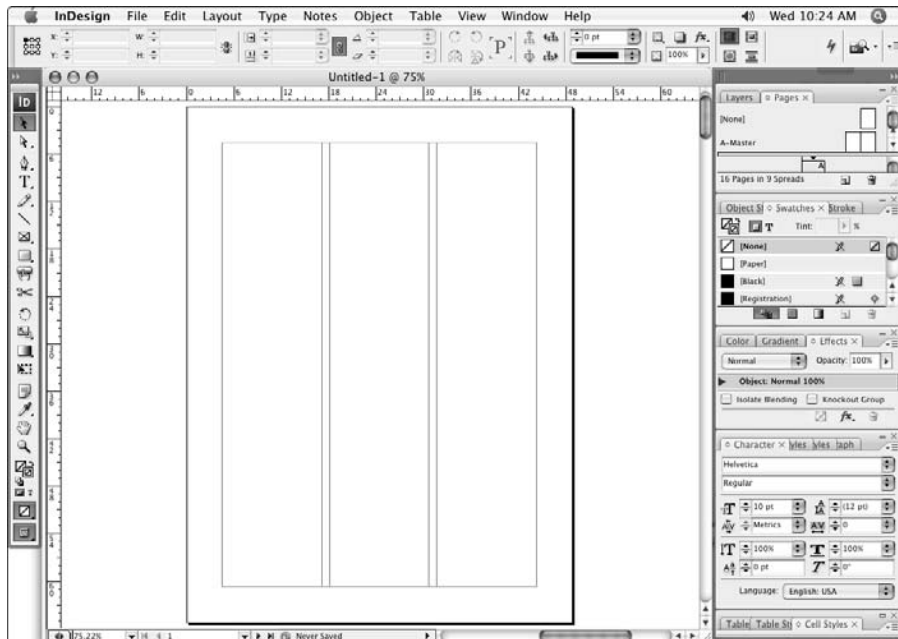
Figure 3-2:
The results of the settings in the New Document dialog box shown in Figure 3-1.

Banishing Version Cue

Adobe's Version Cue feature is meant to help people collaborate in a workgroup, so you can share a master file with multiple people, each working on it in turn. Version Cue even lets you save different versions of a file, so you can experiment and then decide which one to keep. But Version Cue is complicated and difficult to use for beginners. If you find it unwieldy, you can accomplish its basic functions simply by saving common files to a network server and saving new versions with slightly different names, so you can later choose the version you want.

InDesign turns Version Cue on for you automatically within InDesign. But that won't really affect you unless Version Cue is also turned on for your computer — when it's turned on in both places, you'll see Version Cue options in your Open a File, Export, and Save dialog boxes; you'll also see the Check In menu option become available in the File menu. To get rid of Version Cue, just choose InDesign⇨Preferences⇨File Handling or press ⌘+K on the Mac, or choose Edit⇨Preferences⇨ File Handling or press Ctrl+K in Windows, and then uncheck the Enable Version Cue option. Click OK. Voilà! Version Cue is disabled within all your Adobe Creative Suite 3 software.

If other people in your workgroup are using Version Cue, you might also go to the Macintosh System Preferences dialog box (⌘⇨System Preferences) or the Windows Control Panel (Start⇨Control Panel⇨Classic View in the Windows XP and Windows Vista interface, or Start⇨Settings⇨Control Panels in the Classic Start menu interface) and double-click the Adobe Version Cue CS3 iconic button. Clicking that button opens a pane that has an option to turn off the Version Cue server. (Click Stop to disable the server immediately, and uncheck the Turn On Server When the Computer Starts option to keep it off when you next start up your computer.) This prevents your computer from being a server to other Version Cue users on the network, so they cannot work on your files.

In some cases, you might want to leave Version Cue on (maybe because you use it occasionally in a workgroup setting) but not use its unique dialog boxes for opening, saving, exporting, and importing until you're ready to use the Version Cue tools. That's also easy: First, make sure Version Cue is turned on within InDesign and for your computer. Then click the Use OS Dialog button in the Open a File, Save As, Export As, Load, and other dialog boxes that work with file-names. Clicking OS Dialog brings you to the standard Mac or Windows dialog boxes, which will continue to display until you later click Use Adobe Dialog button in any of those dialog boxes. Clicking the Use Adobe Dialog button in any of those dialog boxes brings back the Version Cue interface for all of those dialog boxes. Note that these dialog box changes affect only InDesign CS3, not your other Adobe software.

Opening InDesign files

To open an InDesign file (any version from 1.0 to CS3), follow these steps:

1. **Choose File⇨Open, or press ⌘+O or Ctrl+O.**

   The Open a File dialog box, shown in Figures 3-3 and 3-4, appears. The Open a File dialog box will differ based on whether you are using Adobe's Version Cue file-management system or the standard Mac or Windows interface. The sidebar "Banishing Version Cue" later in this chapter explains how to turn Version Cue off.

REMEMBER

This book's screen shots assume that you are not using Version Cue, so this is the only time I'll show you the Version Cue interface.

When I do show Windows screens, I'll show them in Windows XP only, unless the Windows Vista screen is radically different. In practically every case, though, InDesign in Windows Vista looks just like it does in Windows XP, except for colors and slight adjustments where elements are placed in some dialog boxes such as Open a File and Save.
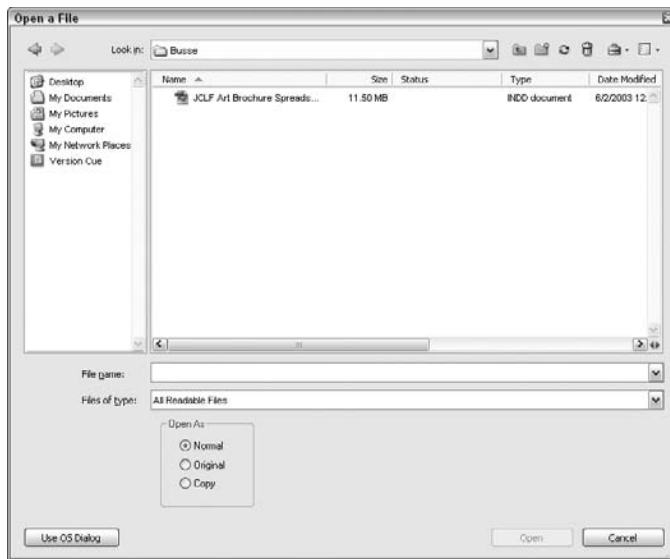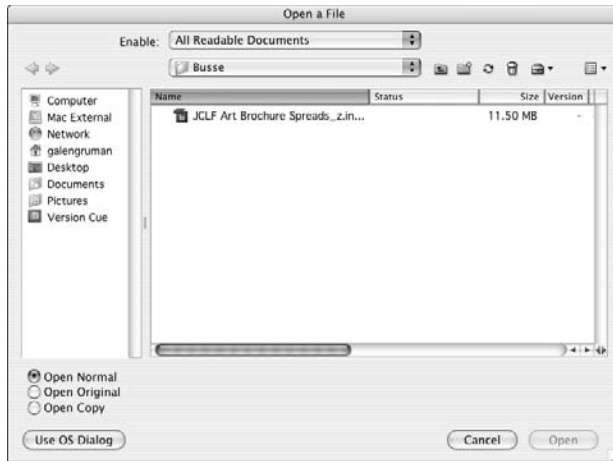
Figure 3-3:
The Open a File dialog box with Version Cue enabled (Mac at top, Windows XP at bottom).
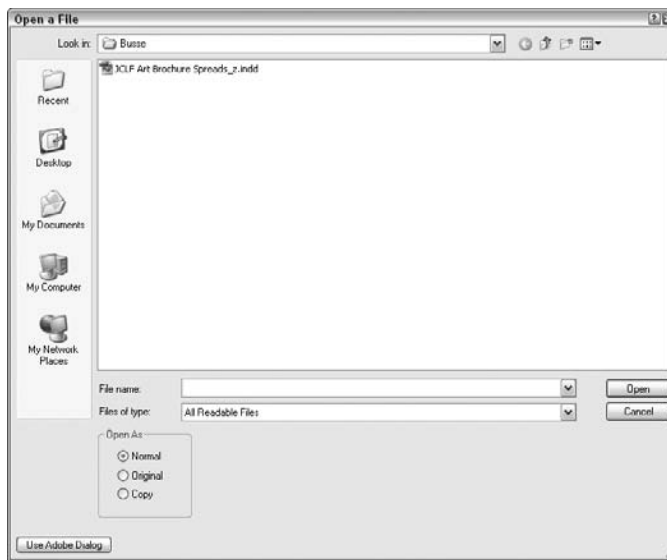
Figure 3-4:
The Open a File dialog box with Version Cue disabled (Mac top, Windows XP at bottom).

2. **Locate and open the folder that contains the document(s) you want to open.**

   Select a single filename or hold down the ⌘ or Ctrl key and select multiple filenames.

   In Windows, the Files of Type pop-up menu offers several options: PageMaker 6.0–7.0 files, QuarkXPress 3.3–4.1 files, InDesign files, InDesign Interchange, Adobe PDF Creation Settings Files, and All Formats. Choose any of these options to display a specific file format in the file list. (The Adobe PDF Creation Settings Files option is for experts, so don't worry about it for now.)

On a Mac, the Open a File dialog box will display any supported file formats that have a filename extension, and the dialog box includes a Preview pane that displays a thumbnail version of the selected file or, more commonly, its icon. Use All Documents in the Enable pop-up menu to display files without the expected filename extensions (typically, those transferred or copied from a computer running Mac OS 9).

In Windows, the Open a File dialog box will display any supported file formats that have a supported filename extension. Use All Files in the Files of Type pop-up menu to display files with no filename extensions (typically, these are files created on an older version of the Mac OS).

3. **Select Open Normal at the bottom of the dialog box to open the original version of the document or a copy of a template; click Open Original to open the original version of the document or of a template; click Open Copy if you just want to open a copy of it.** (Chapter 6 covers templates.)

In Windows, the options are labeled simply Normal, Original, and Copy, and appear under the Open As label.

When you open a copy of a document, it's assigned a default name (Untitled-1, Untitled-2, and so on).

4. **Click OK to close the dialog box.**

Each document you opened is displayed in a separate document window. The page and view magnification used when the document was last saved is also used when you open the document. (Chapter 1 covers document views.)

An alternative approach is to choose File⇨Browse to open the Adobe Bridge program, which provides an alternative way to find files on your computer. Bridge is an expert feature that most InDesign users — even advanced ones — never use. Its biggest attraction is that it lets you see previews of almost all files you'd be working with in your layouts. But if you're a Photoshop user, you may be a big fan and therefore be comfortable using it for InDesign files as well.

Opening foreign formats

One of InDesign's hallmarks is its ability to open documents from other programs and convert them into InDesign documents. You can open documents created in PageMaker 6.0, 6.5, and 7.0 as well as QuarkXPress and QuarkXPress Passport 3.3, 4.0, and 4.1. (Chapters 28 and 29 cover conversion issues in greater detail.)

But beware: InDesign's ability to open a foreign-format file doesn't mean you get a perfect translation. The other programs' formats and capabilities are so different from InDesign's that you should expect to spend time cleaning up the converted files by hand. In some cases, you might find that the amount of cleanup work is greater than if you simply re-create the document from scratch in InDesign — don't panic when this is the case. And be happy when your documents convert effortlessly. The good news is that InDesign will alert you to any import issues of PageMaker and QuarkXPress files with a dialog box that appears after the import is complete, as Figure 3-5 shows.

Figure 3-5:
InDesign
shows a
Warnings
dialog box if
there are
any issues
in importing
foreign file
formats.
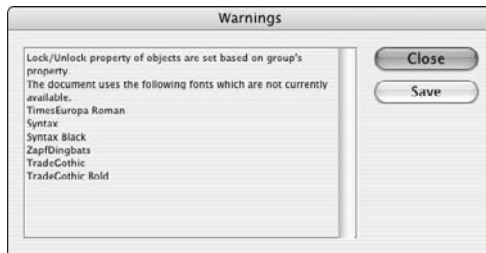
Saving documents

When you open a new document, it's assigned a default name — Untitled-1, Untitled-2, and so on — and the first page is displayed in the document window. At this point, you're like a painter in front of a blank canvas. You can work on your layout without giving it a name, but it's best to give it a name by saving it as soon as possible so you don't lose any changes to a power outage or other system problem.

The second group of commands in InDesign's File menu — Close, Save, Save As, Save a Copy, Check In, and Revert — provide options for saving the active (frontmost) document. Here's a rundown of what each command does:

➤ **Close** (⌘+W, or Ctrl+W or Ctrl+F4) closes the active document. If the document has never been saved or if it has been changed since it was last saved, a dialog box lets you save, close without saving, or cancel and return to the document.

To close multiple windows at once, use the shortcuts Option+Shift+⌘+F4 or Ctrl+Alt+Shift+W.

✔ **Save** (⌘+S or Ctrl+S) saves changes you've made to the active document since you last saved. (If you choose Save for a document that hasn't yet been saved, the Save As dialog box is displayed.)

✔ **Save As** (Option+⌘+S or Ctrl+Alt+S) lets you save a copy of the active document using a different name (or with the same name in a different folder). When you choose Save As — and when you choose Save for an unsaved document — the Save As dialog box, shown in Figure 3-6, appears. This dialog box lets you create or choose a folder for the document, as well as name the document.

✔ **Check In** saves the current document as a version within a Version Cue project. This latest save will be considered a version of the previously saved file. (This expert option is available only if Version Cue is enabled. It had been called Save a Version in previous versions of InDesign.)

✔ **Save a Copy** lets you create a copy of the active document in a different (or in the same) folder using a different (or the same) name. When you use the Save a Copy command, the original document remains open and retains its original name. It differs from Save As only in that it keeps the original document open.

✔ **Revert** undoes all changes you've made to a document since you last saved it.

Exporting document content

InDesign's Save commands (Save, Save As, and Save a Copy) let you save documents and templates in InDesign's native file format. But the Export command (File➪Export) lets you save the stories — and in some cases stories and whole layouts — from InDesign documents in several formats: InDesign Interchange, Rich Text Format (RTF), Text Only, InDesign Tagged Text, Encapsulated PostScript (EPS), Portable Document Format (PDF), JPEG, and Scalable Vector Graphics (SVG).

Note that when exporting a file, you need to choose a format from the Format menu (Mac) or Save as Type menu (Windows).
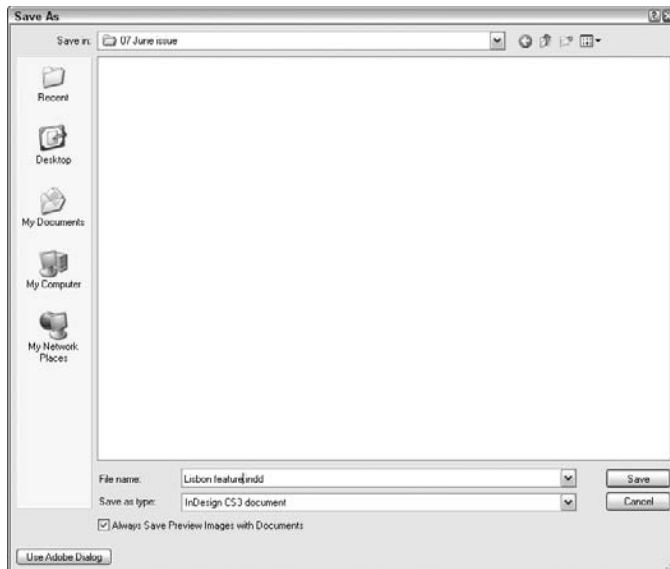
Figure 3-6: The Mac version of the Save As dialog box (top) and the Windows version (bottom) are slightly different.

Here are your format options in more detail:

- ✔ **InDesign Interchange format:** You can make your InDesign CS3 files readable by InDesign CS2 users by saving your files in the InDesign Interchange format. (Only InDesign CS2 and CS3 can open InDesign CS3's Interchange files. Similarly, InDesign CS3 can open only InDesign CS2 Interchange and CS3 Interchange files, as well as any version of regular InDesign document files.)

- ✔ **Word-processing formats:** If you place the text cursor into a story, you can export its text (select a range of text if you want to export only that selection) into one of two formats: RTF, for import into word processors with only basic formatting retained; and Text Only, for import into word processors that don't support RTF (with Text Only, note that no formatting is retained).

    You can save only one text file at a time. If you need to export several stories from the same document, you must do so one at a time.

- ✔ **InDesign workflow formats:** If text is selected via the Type tool, you can save the story in the InDesign Tagged Text format (for editing in a word processor and later reimporting into InDesign CS3 with all InDesign formatting retained) or in the InDesign CS Interchange format (for import into InDesign CS2).

- ✔ **Production formats:** If text or a frame is selected via the Type tool or the Direct Selection tool, you can save the document — not just the story — in EPS or PDF formats for use by prepress tools and service bureaus or for import into other applications as pictures.

- ✔ **Online formats:** If text or a frame is selected via the Type tool or the Direct Selection tool, you can save the document — not just the story — in XML format for use in online database-oriented content-management systems, as well as a specific page, spread, or text selection into JPEG or SVG formats for use as online graphics.

Two separate options are available for the entire document (no matter what tool is active) or for whatever objects are selected. One is File➪Cross-Media Export➪XHTML/Dreamweaver, which lets you export InDesign layouts to the structured HTML format for use in Web creation programs such as (but not limited to) Adobe Dreamweaver. The other is File➪Cross-Media-Export➪XHTML/Digital Editions, which lets you create a new type of online multimedia document, called an e-book. You can also export XML files by choosing File➪Cross-Media-Export➪XML, as well as by using the regular Export dialog box (File-.Export). All three are expert features that are beyond the scope of this book.

Recovering from Disaster

Make sure that when you work on InDesign documents, you follow the first rule of safe computing: Save early and often.

InDesign includes an automatic-recovery feature that protects your documents in the event of a power failure or a system crash. As you work on a document, any changes you make after saving it are stored in a separate, temporary file. Under normal circumstances, each time you choose Save, the information in the temporary file is saved to the document file. The data in the temporary file is important only if you aren't able to save a document before a crash. (A word of warning: Although InDesign's automatic recovery feature is a nice safety net, you should still be careful to save your work often.) If you suffer a system crash, follows these steps to recover your most recent changes:

1. **Relaunch InDesign or, if necessary, restart your computer and then launch InDesign.**

2. **If automatic-recovery data is available, InDesign automatically opens the recovered document and displays the word "Recovered" in the document's title bar.**

   This lets you know that the document contains changes that were not included in the last saved version.

3. **If you want to save the recovered data, choose File⇨Save; "Recovered" is removed as part of the filename, and InDesign asks if you want to overwrite the old file.**

   Overwriting the old file is easier than using File⇨Save As and entering a name — unless you do want to save a copy of the file in case you want to go back to the old version later. If you want to use the last saved version of the document (and disregard the recovered data), close the file (File⇨Close, or ⌘+W or Ctrl+W) without saving, and then open the file (File⇨Open, or ⌘+O or Ctrl+O).

Sometimes, InDesign can't automatically recover the documents for you. Instead, it gives you the choice of recovering any files open during a crash or power outage, saving the recovery data for later, or deleting the recovery data. You typically want to recover the files immediately.

Chapter 4

Discovering How Pages Work

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*I*t's a rare InDesign user who creates only one-page documents. Even if you spend your time working on business cards, ads, and posters, you probably produce at least a few multi-page documents. And if you create newsletters, newspapers, books, catalogs, or any other such multi-page publications, you must know how to add pages to your document, move pages around if you change your mind, and delete pages if necessary. InDesign also lets you divide multi-page documents into independently numbered sections.

As documents grow in size, getting around can be a real drag — on your time, that is. The longer you spend getting to the page you want, the less time you have to work on it. Fortunately, InDesign provides several navigation aids that make it easy to move around on a page or in a document.

Understanding the Pages Panel

The Pages panel is where you do most of your page actions, so you get to know it better as you use InDesign more.

If you intend to create a multi-page document, you want to display the Pages panel (Window⇨Pages, or ⌘+F12 or Ctrl+F12), shown in Figure 4-1, because it provides the controls that let you add pages (both document and master), delete and move pages, apply master pages to document pages, and navigate through a document.

NEW FEATURE CS3

The shortcut for accessing the Pages panel has changed to ⌘+F12 or Ctrl+F12 in InDesign CS3 from just F12 in previous versions. But you can also still use F12, though that might conflict with Apple's Exposé software on the Mac.

For more information about using the Pages panel to work on master pages, see Chapter 6.
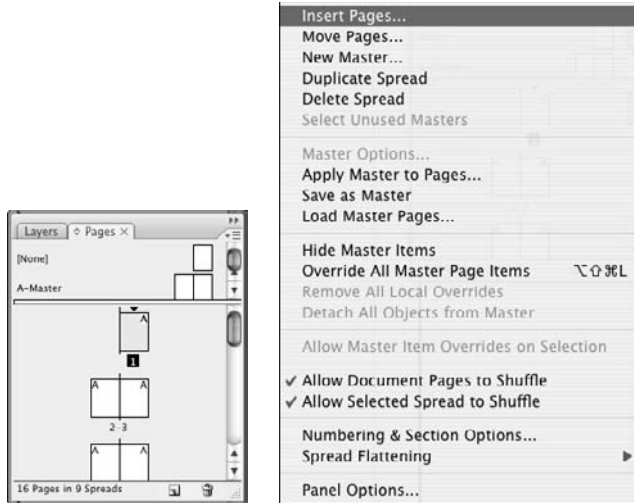
Keep in mind that the overwhelming majority of multi-page documents are facing-pages publications such as books, catalogs, and magazines. Some exceptions are flip charts and three-hole-punched publications printed on only one side. In this chapter, the figures show examples of a facing-pages document. If you create a single-sided multi-page document, the techniques are the same as for facing-pages documents, but the icons in the Pages panel show only single-sided page icons (the icons aren't dog-eared).

Adding pages

A document can contain as many as 9,999 pages — more than anyone would ever want to have in one file. In general, try to break up long publications into logical pieces. For example, if you're creating a book, it's a good idea to create separate documents for the front matter, each chapter, the index, and any other parts (appendixes and so on). Also, if you're producing a long doc-ument, you want to take advantage of master pages (covered in Chapter 6), which save you the work of building each page from scratch.

When you create a multi-page document, you're free to add however many pages you want. But be careful: Even though InDesign will let you create a seven-page newsletter, in real life, facing-page publications always have an even number of pages — usually a multiple of 4 and often a multiple of 16 — because of the way printers arrange multiple pages on a single sheet of paper before folding and cutting them into the final document.

Here's how to add pages to a document:

1. **If it's not displayed, open the Pages panel by choosing Window⇨Pages or pressing ⌘+F12 or Ctrl+F12.**

2. **From the Pages panel's flyout menu, choose Insert Pages.**

   The Insert Pages dialog box, shown in Figure 4-2, appears.

Figure 4-2:
The Insert
Pages
dialog box.

Insert Pages	
Pages: 11	OK
Insert: After Page ⬍ ⬍1	Cancel
Master: A–Master ⬍	
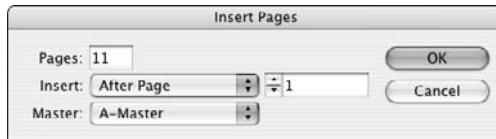
3. **In the Pages field, type the number of pages you want to add.**

4. **Select an option from the Insert pop-up menu: After Page, Before Page, At Start of Document, or At End of Document.**

   Be careful: If you've already started working on page 1, for example, make sure you add new pages *after* page 1. Otherwise, it won't be page 1 anymore, and you'll have to move the objects you already created.

5. **Type a page number in the field next to Insert or use the arrows to increase or decrease the value in one-page increments.**

6. **From the Master pop-up menu, select the master page you want to apply to the new pages.**

7. **When you're finished, click OK to close the dialog box.**

TIP InDesign offers a faster way to add and manipulate pages if you don't happen to have the Pages panel already open: Choose Layout⇨Pages, and then select the appropriate option, such as Add Pages, from the submenu. The resulting dialog boxes match those accessed from the Pages panel.

TIP If you want to quickly add just one page after the current page, click Layout⇨ Pages⇨Add Page or just press Shift+⌘+P or Ctrl+Shift+P.

You can also add new pages or spreads one at a time at the end of a document by clicking the Create New Page iconic button at the bottom of the Pages panel. (Spreads are added if a spread is selected in the Pages panel.) When you use this method, the master page applied to the last document page is applied to each new page. Pages are added after the currently selected page in the panel.

You can also click and drag a master page icon (or both pages in a facing-pages spread to add a spread) from the top of the Pages panel to add a page using a master page's settings (use the [None] page for a plain page) between

any pair of document page spreads or to the right of the last document spread. If a vertical bar appears when you release the mouse button, the spread is placed between the spreads on either side of the bar. If a vertical bar does not appear between document page spreads when you release the mouse button, the new spread is placed at the end of the document.

TIP

When you insert an uneven number of new pages into a facing-pages document, existing pages are automatically changed from left-hand pages to right-hand pages, and vice versa. You can prevent this for selected spreads by first selecting them in the Pages panel and then clicking Keep Spread Together in the flyout menu. You might do this for a spread, such as a two-page table, that you don't want to have broken apart when other pages are added or deleted. Of course, for proper printing, you might need to move that spread when you're done adding or deleting pages so that it follows a complete spread.

Selecting pages

InDesign offers several choices for selecting pages from a document, so you can move, delete, copy, or otherwise manipulate them:

- ✔ Click a page's icon in the Pages panel to select it.
- ✔ To select both pages in a spread, the easiest way is to click a spread's page numbers to select both pages.
- ✔ To select a range of pages, you can click a page icon or spread number beneath it and then Shift+click another page icon or spread number.
- ✔ To select multiple, noncontiguous pages, hold down the ⌘ or Ctrl key and click page icons or spread numbers.

NEW FEATURE
CS3

InDesign CS3 now shows a preview image of your pages in the Pages panel. You can control the display by choosing Panel Options from the panel's flyout menu. In the Panel Options dialog box, select the desired icon size and make sure Show Thumbnails is checked. You can also set separate view settings for master pages.

Copying pages

You can copy pages from one document to another by clicking and dragging the page icon(s) from the source document's Pages panel to the target document's Pages panel. Any master page(s) associated with the copied document pages(s) are copied as well.

You can also duplicate the current spread within the current document by clicking Duplicate Spread from the Pages panel's flyout menu or by choosing Layout➪Pages➪Duplicate Spread.

Deleting pages

The fastest way to delete selected pages is either click and drag them to the pane's Delete Selected Pages button (the trashcan icon) or simply click the Delete Selected Pages button.

Moving pages within documents

To move a page within a document, drag its icon between two spreads or between the pages of a spread inside the Pages panel. A vertical bar indicates where the selected page will be placed. Release the mouse button when the vertical bar is where you want to move the page. To move a spread, drag the page numbers beneath the icons (rather than the page icons themselves).

InDesign now automatically scrolls the Pages panel's pages as you move pages up or down. Before, you had to enlarge the panel so the location you wanted to drag the pages to was visible. That was a real pain that thankfully has gone away.

Alternatively, you can select the pages you want to move in the Pages panel and then choose Move Pages from the Pages panel's flyout menu. (If you don't want to work through the Pages panel, you can also choose Layout➪Pages➪Move Pages.) In that dialog box, you can specify where to move the pages: after a specific page, before a specific page, at the beginning of the document, or at the end of the document.

Although you can move pages around in a document, do so only with great care — if at all. Generally, if you want to move the objects on one page to another page, it's safer to cut (Edit➪Cut or ⌘+X or Ctrl+X) or copy (Edit➪Copy, or ⌘+C or Ctrl+C) the objects than to move the page, which might cause subsequent pages to shuffle.

What's the big deal about shuffling? Shuffling will move pages around to make space for the moved page, and that can move what had been left-hand pages to the right-hand side of the spread and vice versa. If you have different align-ments on left and right pages — such as having page numbers on the outside of pages — this shuffling can wreak havoc with that alignment.

If you absolutely must move a single page, it's safer to move its spread. (Of course, if you're working on a single-sided facing-page document, shuffling is not an issue.)

Moving pages among documents

You can also copy or move pages to other documents. Select the page in the Pages panel, and then drag its icon to the document you want to copy or move it to.

NEW FEATURE CS3 New to InDesign CS3 is the Insert Pages dialog box that appears, giving you a choice of where to insert the page in the new document as well as whether to copy or move the page into the new document. (In previous versions, InDesign just copied the page in front of the current one.) To move a page rather than copy it, be sure to check the Delete Pages After Inserting option.

Alternatively you can copy or move pages among documents by choosing Layout➪Pages➪Move Pages, or by choosing Move Pages from Pages panel's flyout menu, either of which opens the Move Pages dialog box. Here, you also can select the destination (at which page number to insert the new pages) and — new in InDesign CS3 — which document you want to move the page into via the Move to pop-up menu. (The document must be open to display in that pop-up menu.) To move a page rather than copy it, be sure to check the Delete Pages After Moving option.

Figure 4-3 shows both the Insert Pages and Move Pages dialog boxes.

Figure 4-3: The Insert Pages dialog box (top) displays when you drag pages between documents, while the Move Pages dialog box (bottom) displays through a menu option.
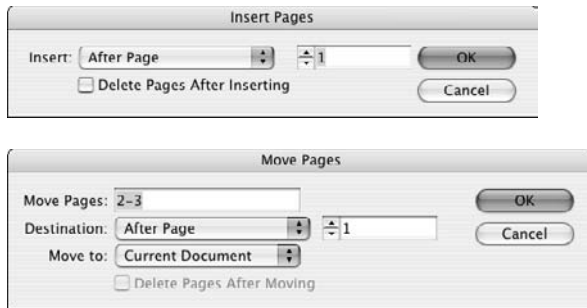
Starting documents on a left page

By default, InDesign starts all documents on the right page, which makes sense because the first sheet in a document is always a right-hand page. But

sometimes you want documents to start on a left-hand page, particularly if they are a chapter or section in a larger document. For example, magazine articles often start on a left page, giving the introduction a full spread. To start a document on a left page:

1. **Select the first page in the Pages panel and then choose Numbering & Section Options from the panel's flyout menu or choose Layout⇨Numbering & Section Options.**

2. **Select the Start Section option.**

3. **Select the Start Page Numbering At option and enter an even number in the field.**

4. **Click OK.**

    The Pages panel will update, showing the start page on the left of the spine.

    You may not want to assign a starting page number (for example, if the starting page number is unknown because the number of pages that precede this document is unknown and you let the book feature determine the page numbers later). In this case, repeat Step 1, but deselect Start Section. Doing so leaves the page as a left-hand page but let the book feature figure out the page number.

See Chapter 23 for more information on the book feature and long-document creation. Sections are covered later in this chapter.

Working with Page Numbers

By default, pages are numbered automatically starting at 1, but you can change the page numbering from Arabic numerals to Roman numerals or letters, as well as change the start page to something other than 1. To do so, select the first page in the document in the Pages panel and choose Layout⇨Numbering & Sections or choose Numbering & Section Options from the Pages panel's flyout menu. You get the dialog box shown in Figure 4-4. (If the current page is not the first page in the document and if a section had not been applied to this page previously, the dialog box is called New Section. Its options are identical.)

To change the initial page number, select the Start Page Numbering At option and type a new starting page number in its field. To change the page numbering style from the default of Arabic numerals (1, 2, 3, 4 . . .), use the Style pop-up menu and choose from I, II, III, IV . . . ; i, ii, iii, iv . . . ; A, B, C, D . . . ; and a, b, c, d . . . .

TIP

To have a facing-pages document start on a left-hand page, the starting page number must be even.

Figure 4-4:
The
Numbering
& Section
Options
dialog box
lets you
change the
starting
page
number and
the types of
numerals
used.
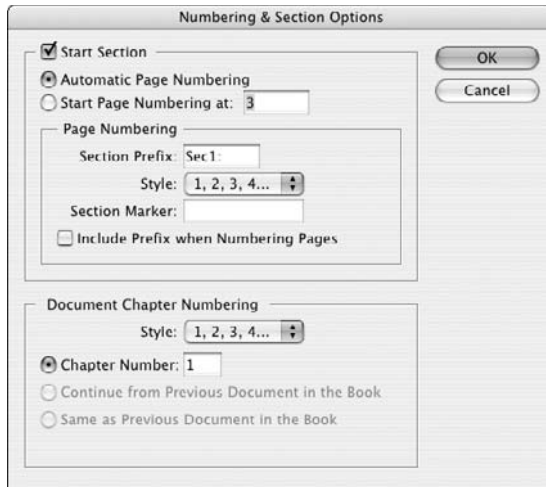
Dividing a document into sections

Some long documents are divided into parts that are numbered separately. For example, the page numbers of book introductions often use Roman numerals, while standard Arabic numerals are used for the body of the book. If the book has appendixes, a separate numbering scheme could be applied to these pages. In InDesign, such independently numbered parts are referred to as *sections*.

A multi-page document can contain as many sections as you want (a section has to contain at least one page). If each section of a document uses a different page layout, you probably want to create a different master page for each section. Here's how to create a section:

1. **If it's not displayed, open the Pages panel by choosing Window⇨ Pages or pressing ⌘+F12 or Ctrl+F12.**

2. **Click the icon of the page where you want to start a section.**

3. **Choose Numbering & Section Options from the panel's flyout menu.**

   If you've selected the document's first page, the Numbering & Section Options dialog box appears (refer to Figure 4-4). Otherwise, the identical New Section dialog box appears. By default, the Start Section option is selected. Leave it selected.

   You can also create a section starting at the current page in your document by choosing Layout⇨Numbering & Section Options.

4. In the Section Prefix field, type up to eight characters that identify the section in the page-number box at the lower-left corner of the document window.

For example, if you type **Sec2**, the first page of the section will be displayed as Sec2:1 in the page-number box. This prefix won't appear as part of the actual page numbers when you print — it's really just a way for you to keep track of sections while you work.

5. From the Style menu, choose the Roman numeral, Arabic numeral, or alphabetic style you want to use for page numbers.

6. For Page Numbering, select the Automatic Page Numbering option if you want the first page of the section to be one number higher than the last page of the previous section.

The new section will use the specified style; the previous section may use this style or another style.

7. Select the Start Page Numbering At option and type a number in the accompanying field to specify a different starting number for the section.

For example, if a book begins with a section of front matter, you could begin the body section of a book on page 1 by choosing Start At and typing **1** in the field. If you select Continue from Previous Section, the first page of the body section begins one number higher than the numeral on the last page of the front matter.

8. In the Section Marker field, type a text string that you can later automatically apply to pages in the section.

You might want to enter something straightforward like **Section 2** or, if the section is a chapter, the name of the chapter.

TIP

You can insert the section marker name so it prints in folios, chapter headings, and story text by choosing Type⇨Insert Special Character⇨Markers⇨Section Marker. This is a great way to get a chapter name (if you use it as the section marker) in your folio or to have cross-references in text to a section whose name might later change. (A *folio* is the collection of a page number, magazine or chapter name, section name, or issue date, and so forth that usually appears at the top or bottom of pages.)

9. Click OK to close the dialog box.

When you create a section, it's indicated in the Pages panel by a small, black triangle over the icon of the first page in the section, as shown in Figure 4-5. (If you move the mouse pointer over the black triangle, the name of the section appears.) The page-numbering scheme you specify is reflected in the page numbers below the page icons. When you begin a section, it continues until the end of the document or until you begin a new section.

TIP

By default, the Pages panel displays section numbers beneath the icons of document pages. If you want to display absolute page numbers — the first page is page 1 and all other pages are numbered sequentially — you can do so by choosing InDesign➪Preferences➪General or pressing ⌘+K on the Mac, or by choosing Edit➪Preferences➪General or press Ctrl+K in Windows. Then choose Absolute Numbering from the General pane's View pop-up menu.

Figure 4-5: The small triangle above a page icon represents a section start.
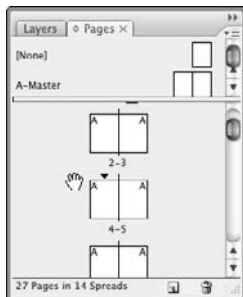
Removing a section start

If you decide that you want to remove a section start, navigate to the page that begins the section, choose Numbering & Section Options from the Pages panel's flyout menu, or choose Layout➪Numbering & Section Options, and deselect the Section Start option. That's it! The pages in the former section remain, but their numbering now picks up from the previous pages.

Navigating Documents and Pages

Moving from page to page in a long document and scrolling around a large or magnified page are among the most common tasks you perform in InDesign. The more time you spend navigating to the page or page area you want to work on, the less time you have to do the work you need to do. Like most trips, the less time you spend between destinations, the better.

For navigating through the pages of a document, the Pages panel (Window➪ Pages, or ⌘+F12 or Ctrl+F12) offers the fastest ride. For navigating within a page, you may want to switch to the Navigator panel (Window➪Object & Layout➪Navigator).

Navigating with the Pages panel

When the Pages panel appears, you can use it to quickly move from page to page in a multi-page document and to switch between displaying master pages and document pages. To display a particular document page, double-click its icon. The selected page is centered in the document window. To display a master spread, double-click its icon in the lower half of the panel. (Note that you can reverse the order of master pages and regular pages in the Pages panel by choosing the Panel Options option in the flyout menu.)

The Fit Page in Window command (View⇨Fit Page in Window, or ⌘+0 or Ctrl+0) and Fit Spread in Window command (View⇨Fit Page in Window or Option+⌘+0 or Ctrl+Alt+0) let you enlarge or reduce the display magnification to fit the selected page or spread in the document window. Related view options are View⇨Fit Spread in Window (Option+⌘+0 or Ctrl+Alt+0) and View⇨Entire Pasteboard (Option+Shift+⌘+0 or Ctrl+Alt+Shift+0). (Note that the shortcuts use the numeral *0,* not the letter *O.*)

Navigating with the menus and shortcuts

InDesign also offers several menu commands and keyboard shortcuts to quickly navigate your layout, as Table 4-1 details.

Table 4-1	Page Navigation Menus and Shortcuts		
Navigation	*Menu Sequence*	*Macintosh Shortcut*	*Windows Shortcut*
Go to first page	Layout⇨First Page	Shift+⌘+PgUp	Ctrl+Shift+Page Up
Go back one page	Layout⇨Previous Page	Shift+PgUp	Shift+Page Up
Go forward one page	Layout⇨Next Page or Layout⇨Go Forward	Shift+PgDn or ⌘+PgDn	Shift+Page Down or Ctrl+keypad PgDn
Go to last page	Layout⇨Last Page	Shift+⌘+PgDn	Ctrl+Shift+Page Down
Go to last page viewed	Layout⇨Go Back	⌘+PgUp	Shift+Page Up or Ctrl+keypad PgUp
Go forward one spread	Layout⇨Next Spread	Option+PgDn	Alt+Page Down
Go back one spread	Layout⇨Previous Spread	Option+PgUp	Alt+Page Up

Using the Navigator panel

Although it's possible to use the Navigator panel (Window➪Object & Layout➪ Navigator) to move from page to page in a long document, the Pages panel is better for this task. The Navigator panel is more useful for scrolling within a page, particularly for doing detail work on a page that's displayed at a high magnification. If you're an Illustrator, PageMaker, or Photoshop user, you may already be familiar with the Navigator panel, which works the same in all three applications.

Figure 4-6 shows the Navigator panel and its flyout menu.

Figure 4-6:
The Navigator panel and its flyout menu.

TIP

You can also use the scroll bars at the right and bottom of the document window to move to different areas of a page or to a different page in a document.

Adjusting Page Layouts and Objects

If you've ever created and worked with a document all the way to the finishing touches and then discovered that the page size was wrong from the beginning, you know the meaning of frustration. Manually adjusting the size and placement of all the objects in a document is an ugly chore: one you want to avoid at all costs. However, should the unthinkable happen — you have to modify the size, orientation, or margins of a document that is partially or completely finished — InDesign can automatically resize and reposition objects when you change its basic layout.

For example, maybe you created a magazine for an American audience that subsequently needs to be converted for publication in Europe. Most newsletters in the United States use letter-sized pages (8½ × 11 inches), while in Europe the standard page size for such publications is A4 (210 × 297 mm), which is slightly narrower and slightly taller than U.S. letter size. Of course, you have to change *color* to *colour, apartment* to *flat,* and so on, but you also have to both squeeze (horizontally) and stretch (vertically) every item on every page to accommodate the A4 page's dimensions.

The Layout Adjustment command (Layout⇨Layout Adjustment) gives you the option of turning this chore over to InDesign, which automatically adjusts object shape and position according to the new page size, column guides, and margins.

The Layout Adjustment dialog box lets you turn layout adjustment on or off and specify the rules used to adjust objects when you change page size or orientation, margins, or columns. To adjust a layout, follow these steps:

1. **Choose Layout⇨Layout Adjustment to display the Layout Adjustment dialog box, shown in Figure 4-7.**

Figure 4-7:
The Layout
Adjustment
dialog box.
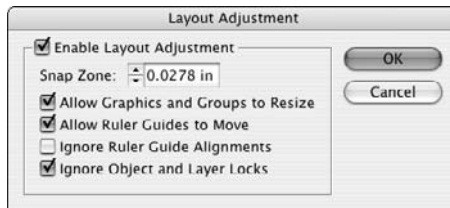
2. **Select the Enable Layout Adjustment option to turn on the feature; deselect it to turn it off.**

3. **In the Snap Zone field, type the distance within which an object edge will automatically snap to a guideline when layout adjustment is performed.**

4. **Select the Allow Graphics and Groups to Resize option if you want InDesign to resize objects when layout adjustment is performed.**

   If you don't select this option, InDesign will move objects but not resize them (the preferred option, so you don't get awkward sizes).

5. **Select the Allow Ruler Guides to Move option if you want InDesign to adjust the position of ruler guides proportionally according to a new page size.**

   Generally, ruler guides are placed relative to the margins and page edges, so you probably want to select this option.

6. **Select the Ignore Ruler Guide Alignments option if you want InDesign to ignore ruler guides when adjusting the position of objects during layout adjustment.**

   If you think that objects might snap to ruler guides that you don't want them to snap to during layout adjustment, select this option. If selected, InDesign will still snap object edges to other margin and column guides.

7. **Select the Ignore Object and Layer Locks option to let InDesign move locked objects (either objects locked directly via Object⇨Lock Position or ⌘+L or Ctrl+L, or objects that reside on a locked layer).**

Otherwise, locked objects will not be adjusted.

8. **When you're done, click OK to close the dialog box.**

The Layout Adjustment feature works best when there's not much work for it to do. Otherwise, it usually creates more work than it saves. For example, the switch from a U.S. letter-sized page to an A4-sized page is a relatively minor change and the layout adjustments will probably be barely noticeable. But if you decide to change a tabloid-sized poster into a business card in midstream, well, you're probably better off starting over.

Here are a few things to keep in mind if you decide to use InDesign's Layout Adjustment feature:

✔ If you change page size, the margin widths (the distance between the left and right margins and the page edges) remain the same.

✔ If you change page size, column guides and ruler guides are repositioned proportionally to the new size.

✔ If you change the number of columns, column guides are added or removed accordingly.

✔ If an object edge is aligned with a guideline before layout adjustment, it remains aligned with the guideline after adjustment. If two or more edges of an object are aligned with guidelines, the object is resized so that the edges remain aligned with the guidelines after layout adjustment.

✔ If you change the page size, objects are moved so that they're in the same relative position on the new page.

✔ If you used margin, column, and ruler guides to place objects on pages, layout adjustment will be more effective than if you placed objects or ruler guides randomly on pages.

✔ Check for text reflow when you modify a document's page size, margins, or column guides. Decreasing a document's page size can cause text to overflow a text frame whose dimensions have been reduced.

✔ Check *everything* in your document after the adjustment is complete. Take the time to look over every page of your document. You never know what InDesign has actually done until you see it with your own eyes.

TIP

If you decide to enable layout adjustment for a particular publication, you might want to begin by using the Save As command (File⇨Save As or Shift+⌘+S or Ctrl+Shift+S) to create a copy. That way, if you ever need to revert back to the original version, you can simply open the original document.

Chapter 5

Layers and Layers

*I*f you've ever seen a series of clear plastic overlays in presentations, understanding layers is easy. In one of those old overhead presentations, the teacher could choose to start with one overlay containing a graphic, add another overlay with descriptive text, and then add a third overlay containing a chart. Each overlay contained distinct content, but you could see through each one to the others to get the entire message. InDesign's layers are somewhat like this, letting you isolate content on slices of a document. You can then show and hide layers, lock objects on layers, rearrange layers, and more.

And unlike those old overhead slides, you can selectively turn layers on or off, so you can use layers for other purposes as well, such as having multiple languages in one document, with each language's text frames on their own layers. Or you could have production notes on their own layer, so you can see them when desired but otherwise keep them out of the way.

What Layers Can Do for You

You could do your work in InDesign without ever once taking a look at the Layers panel. But take a look at the possibilities and see whether they fit into your workflow. In the long run, using layers can save you time and help you prevent mistakes that can result when you need to track changes across multiple documents. It's the kind of feature that, once discovered, can help you work much easier.

Say you've created an ad with the same copy in it but a different headline and image for each city where the ad runs. You can place the boilerplate information on one layer and the information that changes on other layers. If any of the boilerplate information changes, you need to change it only once. To print different versions of the ad, you control which layers print.

You might use layers in the following situations (and in many others):

- ✔ **A project with a high-resolution background image:** For example, a background such as a texture might take a long time to redraw. You can hide that layer while designing other elements, and then show it occasionally to see how it works with the rest of the design.

- ✔ **A document that you produce in several versions:** For example, a produce ad may have different prices for different cities, or a clothing catalog may feature different coats depending on the climate in each area. You can place the content that changes on separate layers, and then print the layers you need.

- ✔ **A project that includes objects you don't want to print:** If you want to suppress printout of objects for any reason, the only way you can do this is to place them on a layer and hide the layer. You might have a layer that's used for nothing but adding editorial and design comments, which can be deleted when the document is final. (Even though InDesign CS3 now adds support for nonprinting notes, they can only be inserted into text, so having a design-comments layer is still useful to be able to make annotations for frames, images, and other nontextual elements.)

- ✔ **A publication that is translated into several languages:** Depending on the layout, you can place all the common objects on one layer, and then create a different layer for each language's text. Changes to the common objects need to happen only once — unlike creating copies of the original document and flowing the translated text into the copies, which you would need to do for each language's version.

- ✔ **To ensure folios and the like are never overprinted.** This book's tech editor and overall production guru, Jonathan Woolson, places folios (the document's page numbers, running headings, and so forth) on their own layer, uppermost in the layer stack. This ensures that they are never accidentally obscured by other objects.

- ✔ **To help text print properly over transparent elements.** Woolson also finds layers useful to isolate text above other objects with transparency effects. This avoids the rasterizing of text during output to plate or film — something that can make the text quality look poor.

Layer Basics

Each document contains a default layer, Layer 1, which contains all your objects until you create and select a new layer. Objects on the default layer — and any other layer for that matter — follow the standard *stacking order* of InDesign. (What's the stacking order? Well, the first object you create is the backmost, the last one you create is the frontmost, and all the other objects fall somewhere in between. This is how InDesign knows what to do with overlapping objects.)

Like the clear plastic overlays, the order of the layers also affects the stacking order of the objects. Objects on the bottom layer are behind other objects, and

objects on the top layer are in front of other objects. For example, for a business card, the Default layer would contain the business card's standard graphics and the main text. An additional layer would contain a different set of contact information — in separate text frames — for a different person. Each new person would have his or her information on his or own new layer. Each layer has its own color, and frames will display in that color if frame edges are visible (choose View➪Show Frame Edges or press Control+⌘+H or Ctrl+H).

Note that the new Mac shortcut for View➪Show Frame Edges is Control+⌘+H; the Windows shortcut (Ctrl+H) is unchanged.

Although people often compare layers to plastic overlays, one big difference exists: Layers aren't specific to individual pages. Each layer encompasses the entire document, which doesn't make much difference when you're working on a one-page ad but makes a significant difference when it comes to a 16-page newsletter. When you create layers and place objects on them, you must consider all the pages in the document.

The Layers panel (choose Window➪Layers or press F7) is your gateway to creating and manipulating layers (see Figure 5-1).

Eye icon (indicates visible layer)

Lock icon (indicates locked layer)

Pen icon
(indicates active layer)

Object icon (indicates layer
associated with selected object)
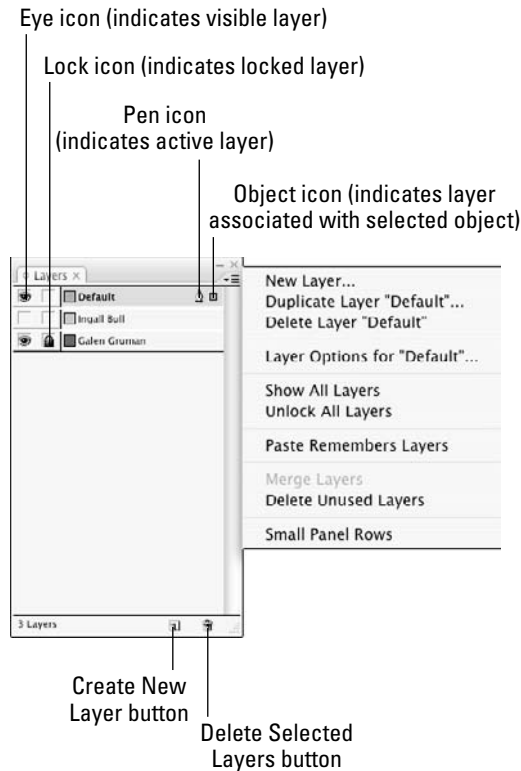
Figure 5-1:
The Layers panel and its flyout menu.

New Layer...
Duplicate Layer "Default"...
Delete Layer "Default"

Layer Options for "Default"...

Show All Layers
Unlock All Layers

Paste Remembers Layers

Merge Layers
Delete Unused Layers

Small Panel Rows

Create New
Layer button

Delete Selected
Layers button

Working with Layers

Each document contains a default layer, Layer 1, that contains all the objects you place on master pages and document pages. You can create as many layers as you need. After you create a new layer, it's activated automatically so you can begin working on it.

Creating a layer

The Layers panel (choose Window➪Layers or press F7) provides several methods for creating new layers. It doesn't matter which document page is displayed when you create a layer because the layer encompasses all the pages in the document. To create a layer, do one of the following:

✔ **To create a new layer on top of all existing layers,** click the New Layer button on the Layers panel to open the New Layer dialog box. The layer receives the default name of Layer *x*.

✔ **To create a layer above the selected layer,** ⌘+click or Ctrl+click the New Layer button. The layer receives the default name of Layer *x*.

✔ **To create a new layer on top of all existing layers but customize its name and identifying color,** Option+click or Alt+click the New Layer iconic button, or choose New Layer from the Layers panel's flyout menu. Use the New Layer dialog box to specify options for the layer. (The New Layer dialog box — set with a custom name and color — is shown in Figure 5-2.)

Figure 5-2:
The New
Layer dialog
box.
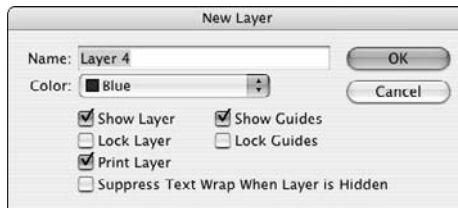
Customizing layers

You can customize the name, identifying color, guides, and lock status of objects on a new or existing layer. If you choose to customize the layer when you create it (by Option+clicking or Alt+clicking the New Layer iconic button or by choosing New Layer from the Layers panel's flyout menu), the New

Layer dialog box appears. If you choose to customize an existing layer, double-click it to display the Layer Options dialog box. (You can also choose Layer Options for *Layer Name* from the flyout menu on the Layers panel.)

Whether you're using the New Layer dialog box shown in Figure 5-2 or the nearly identical Layer Options dialog box, the options all work the same:

- ✔ **Name field:** Type a descriptive name for the layer. For example, if you're using layers for multilingual publishing, you might have a United States English layer, a French layer, and a German layer. If you're using layers to hide background objects while you're working, you might have a Background Objects layer.

- ✔ **Color pop-up menu:** Choose a color from the menu. A layer's color helps you identify which layer an object is on. The color appears to the left of the layer name in the Layers panel and appears on each object on that layer. The color is applied to frame edges, selection handles, bounding boxes, text ports, and text wraps. By default, InDesign applies a different color to each new layer, but you can customize it to something meaningful for your document and workflow.

- ✔ **Show Layer check box:** Selected by default, this control lets you specify whether objects on a layer display onscreen. Hidden layers also do not print. The Show Layer option has the same effect as clicking the eye icon on the Layers panel.

- ✔ **Lock Layer check box:** Deselected by default, this option lets you control whether objects on a layer can be edited. You might lock a layer that contains boilerplate text or a complex drawing that you don't want altered. Locking and unlocking layers is easy, so you might lock one layer while focusing on another, and then unlock it. Select Lock Layer if you don't want to be able to select items and modify them. For example, in a document containing multiple versions of text on different layers, you might lock the layer containing background images and other objects that stay the same. The Lock Layer option has the same effect as clicking the lock icon on the Layers panel. There are additional locking options in the Layers panel's flyout menu to, for example, unlock all layers and lock all layers but the active one.

  The lock icon had been the pencil icon in previous versions of InDesign.

  When you lock an object to a page (by choosing Object➪Lock Position, or ⌘+L or Ctrl+L), the object's position stays locked regardless of its layer's lock status.

- ✔ **Print Layer check box:** Selected by default, this option lets you control whether the layer prints or exports to PDF. You might use this option for a layer containing design comments, for example. (In previous versions of InDesign, deselecting Show Layer also prevented the layer from printing. That remains true, but now you can control whether unhidden layers print or not as well.) You can also override whether nonprinting layers print in the Print dialog box, as explained in Chapter 25.

✔ **Suppress Text Wrap When Layer Is Hidden check box:** Deselected by default, this option prevents text wrapping around the layer's objects when the layer is hidden. Be sure to select this option when you use multiple layers for variations of the same content, such as multilingual text or different contacts for business cards. Otherwise, your layer's text can't display because it's wrapping around a hidden layer with an object of the same size in the same place.

✔ **Show Guides check box:** This check box lets you control the display of guides that were created while the selected layer was active. When selected, as it is by default, you can create guides while any layer is active and view those guides on any layer. When deselected, you can't create guides. Any guides you create while that layer is active are not displayed, but you can still see guides that you created while other layers were active. Note that when guides are hidden entirely (choose View➪Grids & Guides➪Hide Guides, or press ⌘+; [semicolon] or Ctrl+; [semicolon]), this command has no apparent effect.

✔ **Lock Guides check box:** This works similarly to Show Guides in that it affects only the guides that you created while the layer is active. When deselected, as it is by default, you can move guides on any layer for which Lock Guides is deselected. When selected, you cannot move guides created while that layer was active. You can, however, move guides on other layers for which Lock Guides is deselected. Note that when all guides are locked (choose View➪Grids & Guides➪Lock Guides, or Option+⌘+; [semicolon] or press Ctrl+Alt+; [semicolon]), this command has no apparent effect.

TIP

You can select multiple layers and customize them all at once. However, because each layer must have a different name, the Name field isn't available in the Layer Options dialog box when multiple layers are selected.

Working with Objects on Layers

Whether you're designing a magazine template from the ground up or modifying an existing ad, you can isolate specific types of objects on layers. You can create objects on a layer, move objects to a layer, or copy objects to a layer.

The active layer

The *active layer* is the one on which you're creating objects — whether you're using tools, importing text or graphics, clicking and dragging objects in from a library, or pasting objects from other layers or other documents. A

pen icon to the right of a layer's name means it's the active layer. Although more than one layer can be selected at a time, only one can be active. To switch the active layer to another layer, click to the right of the layer name that you want to be active; the pen icon moves, making that the new active layer. Keep in mind that to activate a layer, it must be visible.

Selecting objects on layers

Regardless of the active layer, you can select, move, and modify objects on any visible, unlocked layer. You can even select objects on different layers and manipulate them.

The Layers panel (choose Window⇨Layers or press F7) helps you work with selected objects in the following ways:

- ✔ To determine which layer an object belongs to, match the color on its bounding box to the color that appears to the left of a layer name.

- ✔ To determine which layers contain active objects, look to the right of the layer names. A small square — the object icon — to the right of a layer name indicates that you have selected an object on that layer.

- ✔ To select all the objects on a layer, Option+click or Alt+click the layer's name in the Layers panel. The layer must be active, unlocked, and visible.

To select master-page objects as well as document-page objects on a layer, you need to Option+Shift+click or Alt+Shift+click the layer name.

Placing objects on layers

To place objects on a layer, the layer must be active as indicated by the pen icon. Anything you copy, import, or create in InDesign goes on the active layer.

When you create objects on master pages, they are placed on the default layer and are therefore behind other objects on document pages. To create objects on master pages that are in front of other objects, place the objects on a different layer while the master page is displayed.

You can cut and paste objects from one page to another, but have the objects remain on their original layer — without concern about the active layer. To do this, be sure the Paste Remembers Layers check box is selected in the Layers panel's flyout menu before choosing Edit⇨Paste or pressing ⌘+V or Ctrl+V.

Moving objects to different layers

When an object is on a layer, it isn't stuck there. You can copy and paste objects to selected layers, or you can move them by using the Layers panel. When you move an object to a layer, it's placed in front of all other objects on a layer. To select multiple objects, remember to Shift+click them, and then move them in one of the following ways:

✔ **Paste objects on a different layer.** First cut or copy objects to the Clipboard. Activate the layer on which you want to put the objects, and then use the Paste command (by choosing Edit⇨Paste or by pressing ⌘+V or Ctrl+V). This method works well for moving objects that are currently on a variety of layers.

✔ **Move objects to a different layer.** Click and drag the object icon for the selected objects (to the right of a layer's name) to another layer. When you use this method, it doesn't matter which layer is active. However, you can't move objects from several different layers to the same layer using this method. (If you select multiple objects that reside on different layers, dragging the box moves only objects that reside on the first layer on which you selected an object.)

✔ **Move objects to a hidden or locked layer.** Press ⌘ or Ctrl while you click and drag the selected objects' object icon.

✔ **Copy rather than move objects to a different layer.** Press Option or Alt while you click and drag the selected objects' object icon.

✔ **Copy objects to a hidden or locked layer.** Press Option+⌘ or Ctrl+Alt while you drag the selected objects' object icon.

Manipulating Entire Layers

In addition to working on objects and their layer positions, you can also select and manipulate entire layers. These changes affect all the objects on the layer — for example, if you hide a layer, all its objects are hidden; if you move a layer up, all its objects appear in front of objects on lower layers. Functions that affect an entire layer include hiding, locking, rearranging, merging, and deleting. You work on entire layers in the Layers panel.

Selecting layers

The active layer containing the pen icon is always selected. You can extend the selection to include other layers the same way you multiple-select objects: Shift+click for a continuous selection and ⌘+click or Ctrl+click for a noncontiguous selection.

Rearranging layers

Each layer has its own front-to-back stacking order, with the first object you create on the layer being its backmost object. You can modify the stacking order of objects on a single layer by using the Arrange commands on the Object menu. Objects are further stacked according to the order in which the layers are listed in the Layers panel. The layer at the top of the list contains the frontmost objects, and the layer at the bottom of the list contains the backmost objects.

If you find that all the objects on one layer need to be in front of all the objects on another layer, you can move that layer up or down in the list. In fact, you can move all currently selected layers up or down, even if the selection is noncontiguous. To move layers, click the selection and drag it up or down. When you move layers, remember that layers are document-wide, so you're actually changing the stacking order of objects on all the pages.

Combining layers

When you're just discovering the power of layers, you might create a document that is unnecessarily complex (for example, you might have put each object on a different layer and realized that the document has become too difficult to work with). The good news is that you can also merge all the layers in a document to *flatten* it to a single layer. To flatten all layers:

1. **Select the *target layer* (the layer where you want all the objects to end up) by clicking it.**

2. **Select the *source layers* (the layers that contain the objects you want to move) in addition to the target layer.**

   Shift+click or ⌘+click or Ctrl+click to add the source layers to the selection.

3. **Make sure the target layer contains the pen icon and that the target and source layers are all selected.**

4. **Choose Merge Layers from the Layers panel's flyout menu.**

   All objects on the source layers are moved to the target layer, and the source layers are deleted.

When you merge layers, the stacking order of objects doesn't change, so the design looks the same, but with one notable exception: If you created objects on a layer while a master page was displayed, those objects go to the back of the stacking order with the regular master-page objects.

Deleting layers

If you carefully isolate portions of a document on different layers and then find that you don't need that portion of the document, you can delete the layer. For example, if you have a United States English and an International English layer and you decide that you can't afford to print the different versions, you can delete the unneeded layer. You might also delete layers that you don't end up using to simplify a document.

When you delete layers, all the objects on the layer throughout the document are deleted.

Using the Layers panel, you can delete selected layers in the following ways:

- ✒ Click and drag the selection to the Delete Selected Layers iconic button.
- ✒ Click the Delete Selected Layers iconic button. The currently selected layers are deleted.
- ✒ Choose Delete Layer from the Layers panel's flyout menu.

If any of the layers contain objects, a warning reminds you that they will be deleted. And, of course, the ubiquitous Undo command (choose Edit⇨Undo or press ⌘+Z or Ctrl+Z) lets you recover from accidental deletions.

To remove all layers that don't contain objects, choose Delete Unused Layers from the Layers panel's flyout menu.

Chapter 6

The Joys of Reuse

*U*nless you enjoy continually reinventing the wheel, you'll want to take full advantage of the features that InDesign offers to help you work more productively. After you make some important decisions about elements in your document that will repeat, page after page, in the same spot (such as page numbers, graphics, headers and footers, and so on), you want to set up mechanisms that make the process simple.

Fewer activities in life are less rewarding than doing the same job over and over, and publishing is no exception. Fortunately, InDesign includes some valuable features that let you automate repetitive tasks. In this chapter, I focus on three of them: templates, master pages, and libraries. (Note that there are other ways to reuse InDesign elements, such as exporting to PDF or XHTML files, or exporting stories and graphics. These are covered in Chapter 3.)

Building and Using Templates

A *template* is a pre-built InDesign document that you use as the starting point for creating multiple versions of the same design or publication. For example, if you create a monthly newsletter that uses the same basic layout for each issue, but with different graphics and text, you begin by creating a template that contains all the elements that are the same in every issue — placeholder frames for the graphics and text, guidelines, and so on.

Creating templates

Creating a template is very similar to creating a document. You create character, paragraph, and object styles, master pages, repeating elements (for example, page numbers), and so on. The only thing you don't add to a template is actual content.

Most often, you create a template after building the first iteration of a document. After you have that document set up the way you like, you simply strip out the content (that first issue's stories and graphics in our newsletter example) and save it as a template.

Here are the steps for creating a template:

1. **Choose File⇨Save As or press Shift+⌘+S or Ctrl+Shift+S to display the Save As dialog box.**

2. **Choose a folder and specify a name for the file.**

3. **Choose InDesign CS3 Template in the Format pop-up menu (Mac) or Save as Type pop-up menu (Windows).**

4. **Click Save to close the Save As dialog box and save the template.**

TIP If you're designing a template that will be used by others, you might want to add a layer of instructions. When it's time to print a document based on the template, simply hide the annotation layer. (See Chapter 5 for more information about working with layers.)

If you didn't know better, you might think that a template is exactly the same as a regular InDesign document. It is, with one major exception: A template is a bit more difficult to override. When you open a template, it receives a default name (Untitled-1, Untitled-2, and so on). The first time you choose File⇨Save or press ⌘+S or Ctrl+S, the Save As dialog box appears.

Modifying templates

As you use a template over time, you might discover that you forgot to include something — perhaps a paragraph style, a repeating element on a particular master page, or an entire master page. To modify a template, you have two options:

✔ Open it as a normal file, make your changes, and then choose File⇨Save As (or press Shift+⌘+S or Ctrl+Shift+S) to save it again as a template. To open a file as a normal file, be sure that Open Normal (Mac) or Normal (Windows) is selected at the bottom of the Open a File dialog box — this is the default option.

✔ Open it as an original file (see Chapter 3), make your changes, and then choose File➪Save (⌘+S or Ctrl+S) to save it again as a template. To open a file as an original file, be sure that Open Original (Mac) or Original (Windows) is selected at the bottom of the Open a File dialog box — it's easy to forget to select this option, so most people end up using the previous technique to resave the template.

Creating documents from templates

It's very easy to create a document from a template: Just open a template file and save it with a new name, making sure that InDesign CS3 Document is selected in the Format pop-up menu (Mac) or Save as Type pop-up menu (Windows) — this the default setting. Work on your document and continue to save changes normally.

A more complicated way to create a document from a template is to choose File➪New Document from Template. This opens the Adobe Bridge program, which can contain InDesign templates that you open and then save as documents. Bridge is meant as a central place for all Creative Suite documents and many related files such as color libraries to help workgroups have one place for all their Creative Suite needs. I think it's more complicated than it is useful, at least for InDesign users (many Photoshop users love it).

Building and Using Master Pages

A *master page* is a preconstructed page layout that you can use to create new pages — it is the starting point for document pages. Typically, master pages contain text and graphic elements, such as page numbers, headers, footers, and so on, which appear on all pages of a publication. Master pages also include guidelines that indicate page edges, column boundaries, and margins, as well as other manually created guidelines to aid page designers in placing objects. By placing items on master pages, you save yourself the repetitive work of placing the same items one by one on each and every document page.

It may surprise you to know that every InDesign document you create already contains a master page, called A-Master. Whether you use the default master page or create and use additional master pages depends on what kind of document you want to create. If it's a single-page document, such as a flier or an ad, you don't need master pages at all, so you can just ignore them. However, if you want to create a document with multiple pages — a brochure or booklet, for example — master pages save time and help ensure consistent design.

Creating a new master page

When you're ready to create a new master page, here's what you do:

1. **If the Pages panel is not displayed, choose Windows⇨Pages or press ⌘+F12 or Ctrl+F12.**

   The Pages panel is covered in more detail in Chapter 4.

2. **From the Pages panel's flyout menu, choose New Master.**

   You can also hold Option+⌘ or Ctrl+Alt and click the Create New Page iconic button at the bottom of the panel. The New Master dialog box, shown in Figure 6-1, appears.

Figure 6-1:
The New
Master
dialog box.

3. **In the Prefix field, specify a one-character prefix to attach to the front of the master page name and display on associated document page icons in the Pages panel.**

   The default will be a capital letter, such as the *D* in Figure 6-1.

4. **In the Name field, give your new master page a name.**

   It's a good idea to use a descriptive name, such as `Title Page`.

5. **To base the new master page (the *child*) on another master page (the *parent*), choose the parent master page from the Based on Master pop-up menu.**

6. **In the Number of Pages field, enter the number of pages you want to include in the master spread.** For a document with a single-page design, enter **1**; if the document will have facing pages, enter **2**.

7. **Click OK to save the page and close the dialog box.**

Your new master page appears in the document window. The name of the master page appears in the Page Number field in the bottom-left corner of the document window. To make changes to a master page's attributes, simply click its icon at the top of the Pages panel, choose Master Options from the panel's flyout menu, and then change settings in the Master Options dialog box.

Note that you can move master pages to be at the bottom of the Pages panel — rather than at the top — by choosing Panel Options from the flyout menu and enabling the Pages on Top option.

When you're building a master page, you should think more about the overall structure of the page than about details. Keep the following in mind:

✔ **To build a document with facing pages,** create facing-page master spreads. The facing pages are somewhat like mirror images of each other. Typically, the left-hand master page is for even-numbered document pages, and the right-hand master page is for odd-numbered document pages.

✔ **To have page numbers automatically appear on document pages,** add a page number character on each page of your master spreads by drawing a text frame with the Type tool where you want the page number to appear and then choosing Type⇨Insert Special Character⇨Markers⇨Current Page Number or pressing Option+⌘+N or Ctrl+Alt+N. The prefix of the master page (A, B, C, and so on) appears on the master page, but the actual page number is what appears on document pages. Don't forget to format the page number on the master page so that page numbers will look the way you want them to in the document.

✔ **Specify master page margins and columns** by first making sure that the page is displayed in the document window and then choosing Layout⇨Margins and Columns. The Margins and Columns dialog box, shown in Figure 6-2, is displayed. The controls in this dialog box let you specify the position of the margins, the number of columns, and the gutter width (space between columns).

Figure 6-2:
The Margins and Columns dialog box.

Margins and Columns	
Margins	
Top: 10p6 Inside: 1 in	OK
Bottom: 7p6 Outside: 1 in	Cancel
	☑ Preview
Columns	
Number: 3 Gutter: 0.1667	
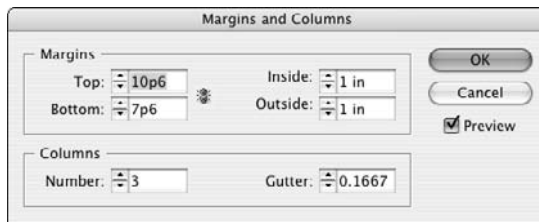
You can place additional guidelines on a master page — as many custom guidelines as you want. (Guidelines are covered in Chapter 11.)

Basing one master page on another

Some publications benefit from having more than one master page. If you're building a document with several pages that are somewhat similar in design, it's a good idea to start with one master page and then use it as a basis for additional master pages.

For example, if the brochure you're working on uses both two-column and three-column page layouts, you can create the two-column master spread first and include all repeating page elements. You can then create the three-column master page spread, basing it on the two-column master, and simply

specify different column formats. The "child" master page will be identical to the parent except for the number of columns. If you later change an element on the original master page, the change will apply automatically to the child master page.

When you create a new master page, the New Master dialog box provides the option to base it on an existing master page. To help you keep things straight, when you base a master page on another master page, InDesign displays the prefix of the parent page on the icon of the child page.

TIP

If you base a master spread on another master spread, you can still modify the master objects (that is, the objects inherited from the parent master) on the child master page. As with regular document pages, you have to Shift+⌘+click or Ctrl+Shift+click the object inherited from a parent master to release it before you can edit it on a child master.

Basing a master spread on a document spread

You might be talented enough to create an effective spread, one that is so handsome that you want to create a master page from it to use on future documents. Simply highlight the spread by clicking the page numbers below the relevant page icons in the Pages panel and choose Save as Master from the Pages panel's flyout menu. The new master is assigned a default name and prefix. To change any of its attributes, click its name in the Pages panel and then choose Master Options from the flyout menu.

Duplicating a master spread

Create a copy of a master spread by selecting its icon and then choosing Duplicate Master Spread from the Pages panel's flyout menu or simply by dragging its icon onto the Create New Page button at the bottom of the panel. Note that if you duplicate a master spread, the duplicate loses any parent/child relationships.

Importing a master page

Sometimes, another document has a master page that you'd like to use in your current layout. InDesign CS3 lets you import those master pages: Just choose Load Master Pages from the Pages panel's flyout menu, select the source document in the dialog box that appears, and click Open. InDesign will import all master pages from that document into your current one. Sorry, there's no way to select specific master pages.

NEW FEATURE CS3

The ability to import master pages is new to InDesign CS3. Before, you had two not-so-great options that required both the source and target documents be open. One option is to create a new master page in your document, and then copy the elements from another document using old-fashioned copy-and-paste. The other option is to drag the name of the master page that you want

to copy from the source document's Pages panel to the target document's document window. (You can still use these two approaches if you insist.)

If any of the imported master pages have the same name as your current document's master pages (such as the default name A-Master), a dialog box will appear giving you the choice of replacing the current master pages with the imported ones that use the same name or of renaming the imported master pages, so you keep what you have and add the imported ones. InDesign does the renaming for you.

Note that InDesign will also alert you if the imported master pages use different dimensions than the current document's pages. It won't adjust the imported pages, so some items may appear off the page if the imported master page has larger dimensions than the current document.

Deleting a master page

To delete a master page, select its name and then choose Delete Master Page from the Pages panel's flyout menu. You can also drag the master icon to the Delete Pages iconic button at the bottom of the Pages panel.

So what happens when you delete a master page on which document pages are based? Don't worry — your document pages are unchanged, though they no longer have a master page (in the Pages panel, the page icons won't display the letter of a master page in their upper outside corners).

TIP

You can remove a master page from a specific document page without removing the master page from your document (and thus other pages), by applying the [None] master page to the document page using the process described next.

Applying a master page to document pages

After you build a master page, you can apply it to new or existing document pages. (See Chapter 4 for information about adding and removing document pages.) For documents with facing pages, you can apply both pages of a master spread to both pages of the document spread or you can apply one page of a master spread to one page of the document spread. For example, you can apply a master page with a two-column format to the left-hand page of a document spread and apply a master page with a three-column format to the right-hand page.

To apply a master page to a document page, select the name or icon of the page in the top part of the Pages panel and then drag it onto the icon of the document page you want to format. When the target document page is

highlighted (framed in a black rectangle, as shown in the left side of Figure 6-3), release the mouse button. If both document pages are highlighted, and if you are applying a master page to the document, both sides of the master spread are applied to the document spread.

Figure 6-3: Applying a single master page to a document page.

TIP
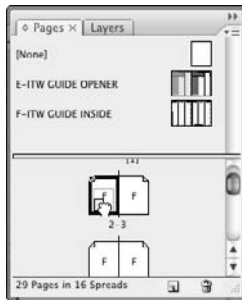
You can also apply a master page to the currently displayed pages by choosing Layout⇨Pages⇨Apply Master to Pages.

Changing master items on document pages

As you work on a document page that's based on a master, you may find that you need to change, move, or delete a master object. Any change you make to a master object on a local page is referred to as a *local override*.

Whenever you remove a master object from a document page, you sever the object's relationship to the master-page object for that document page only. If you subsequently move or modify the object on the master page, it won't affect the deleted object on the document page — it remains deleted on that particular document page.

TIP

The Show/Hide Master Items command in the Pages panel's flyout menu lets you show or hide master objects on document pages.

To change a master object on a document page, you must first select it, and doing so can be a bit tricky. To select a master object on a document page, hold down Shift+⌘ or Ctrl+Shift when you click the object with one of the selection tools. (You can also Shift+⌘+drag or Ctrl+Shift+drag to select multiple objects within the selection marquee.) After you select a master object on a document page, you can modify it just as you would objects that are not part of a master page.

TIP

If you modify one or more master objects on a document page and then decide you want to revert back to using the original master objects, you can remove the local overrides. To do so, display the document page that contains the master objects you've modified, select the objects, and then choose Remove Selected Local Overrides from the Pages panel's flyout menu. If no objects are selected, the command name changes to Remove All Local Overrides. If the selected spread doesn't have any modified master objects, the command is not available.

NEW FEATURE CS3

Sometimes, you don't want people to have the ability to override a master page object. InDesign CS3 gives you a way to block such overrides: With the master page open and any objects selected that you don't want to be overridden, deselect Allow Master Item Overrides on Selection in the Pages panel's flyout menu. With this option deselected, someone won't be able to override the selected master page objects on any document pages using them — unless of course they reselect the Allow Master Item Overrides on Selections option.

Building and Using Libraries

An InDesign *library* is a file — similar in some ways to a document file — where you can store individual objects (graphics, text, and so forth), groups and nested objects, ruler guides, and grids (see Chapter 11). Once an item is in a library, every time you need a copy, you simply drag one out of the library.

Creating a library

Creating a library is easy:

1. **Choose File⇨New⇨Library.**

   The New Library dialog box appears, with essentially the same options as the Save As dialog box covered in Chapter 3.

2. **Choose a location in which to save the library.**

3. **Give the library a name.**

4. **Click OK.**

You can create as many libraries as you want and store them wherever is most convenient, including on a networked server so that other InDesign users can share them. You can also open libraries created on a Mac from a Windows computer, and vice versa.

Right after you create a new library, you see an empty library panel group. Each library that you create or open will appear as its own panel within that panel group, with its name displayed in its tab, as shown in Figure 6-4. To add items to the library, you simply drag them to the desired panel.

Library Item Information button

Show Library Subset
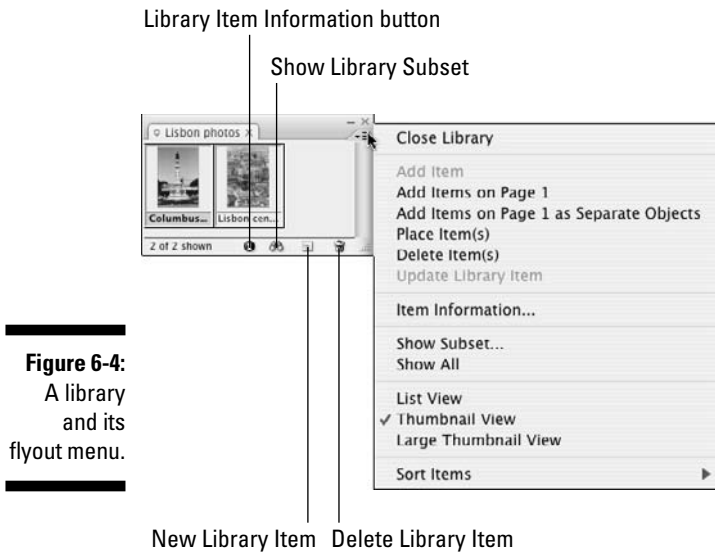
Figure 6-4:
A library
and its
flyout menu.

New Library Item   Delete Library Item

Here is an explanation of some of the controls and commands shown in Figure 6-4:

- ✔ The numbers in the lower-left corner of the panel indicate the number of items currently displayed in the pane and the number of items in the library.

- ✔ The Library Item Information iconic button displays the Item Information dialog box, as does the Library Item flyout menu option. Here you can give each library item a name, a type (for example, image or text), and a description. Later, you can search for library items based on these attributes.

- ✔ The Show Library Subset iconic button displays a dialog box that lets you locate and display items that meet certain search criteria, as does the Show Subset flyout menu option.

- ✔ The Delete Library Item iconic button lets you delete highlighted items in the library, as does the Delete Item(s) flyout menu option.

Why you'll love snippets

InDesign has a neat option called XML snippets that lets you take pieces of your document and create a file that other InDesign users can bring into their documents, preserving all formatting and effects applied to them.

They're sort of like libraries, with a key exception: Each snippet is a separate file, so they're not as easy or as convenient as libraries when you have lots of document pieces that you want to share or make available for reuse. So snippets are best for sharing specific elements on an as-needed basis, whereas libraries are better for having, well, a library of standard, shared elements.

The process of creating snippets is easy: Select the objects and drag them outside your document window onto the Mac or Windows desktop or onto a folder. InDesign automatically creates the XML snippet file containing those objects and their formatting. You can then send that snippet to other users on storage drives, via e-mail, or over the network — like any other file.

To use the snippet in another document, just drag the snippet into your document window. That's it!

Putting items into a library

You can place individual items, such as text and graphics frames, into a library. You can also place multiple selected objects, groups, nested frames, ruler guides, guidelines, and all items on a document page.

To add items to a library:

- ✔ Select one or more items and then drag them into an open library panel. (Open an existing library by choosing File⇨Open or by pressing ⌘+O or Ctrl+O.)

- ✔ Select one or more items and then choose Add Item from the flyout menu of an open Library panel.

- ✔ Choose Add All Items on Page from the flyout menu of an open Library panel to add all items on the current page or spread as *one library item*. Choose Add All Items on Page as Separate Objects to add each object on the page in one step as *separate library items*.

- ✔ Select one or more items and then click the New Library Item iconic button at the bottom of an open Library panel.

TIP

If you hold down the Option or Alt key when adding an item to a library, the Item Information dialog box is displayed. This dialog box lets you add searchable attributes to the library item.

If you import a graphic into a document and then place a copy of the graphic into a library, the path to the original graphics file is saved, as are any transformations you've applied to the graphic or its frame (scale, rotation, shear, and so on). If you save text in a library, all formatting, including styles, is retained.

Tagging library items

A library can hold as many items as you want. As a library grows, locating a particular item can become increasingly difficult. To make InDesign library items easier to find, tag them with several searchable attributes.

To tag a library element, select it and then choose Item Information from the library panel's flyout menu. You can also display the Item Information dialog box by double-clicking a library item or by clicking once on a library item and then clicking the Library Item Information iconic button at the bottom of the Library panel. (It's the *i* in a circle.) Specify a Name, Object Type, and/or Description. In the Description field, use a few words that describe the object; this will make it easier to find later. Click OK to close the dialog box and return to the document.

Searching for library items

You can search for library items based on the information specified in the Item Information dialog box. For example, if you place several different icons into a library that includes many other items, and if you use the term *icon* in the Name or Description field, a search of these fields that includes "icon" will find and display those items stored in your library.

Follow these steps to search a library:

1. **Choose Show Subset from a library panel's flyout menu or click the Show Library Subset iconic button at the bottom of the panel.**

2. **Decide whether to search the entire library or only the items currently displayed in the page and select the appropriate radio button.**

3. **In the Parameters area, choose the Item Information category you want to search from the first pop-up menu.**

   Your choices are Item Name, Creation Date, Object Type, and Description.

4. **From the next pop-up menu, choose Contains if you intend to search for text contained in the chosen category; choose Doesn't Contain if you want to exclude items that contain the text you specify.**

5. **In the Parameter's area text-entry field, type the word or phrase you want to search for (if you selected Contains in Step 4) or exclude (if you selected Doesn't Contain).**

6. **Add more search criteria by clicking the More Choices button; reduce the number of search criteria by clicking Fewer Choices.**

   You can create up to five levels of search criteria. If you select two or more levels of search criteria, you will be able to choose whether to display items that match all search criteria (by selecting Match All) or to display items that match any of the search criteria (by selecting Match Any One).

7. **Click OK to conduct the search and close the dialog box.**

The library items that match the search criteria are displayed in the panel (unless no items matched the search criteria). To display all items after conducting a search, choose Show All from the Library panel's flyout menu.

Deleting items from a library

To delete a library item, drag its icon to the trashcan icon at the bottom of the panel or select the item and then choose Delete Item(s) from the library panel's flyout menu. You can select a range of items by clicking the first one and then Shift+clicking the last one. You can select multiple, noncontiguous items by holding down the ⌘ or Ctrl key and clicking each icon.

Copying library items onto document pages

After an item is in a library, you can place copies of that library item into any document or into another library. To place a copy of a library item onto the currently displayed document page, drag the item's icon from the library panel onto the page. As you drag, the outline of the library item is displayed. Release the mouse button when the outline of the item is positioned where you want it to end up. You can also place a library item onto a document by clicking its icon and then choosing Place Item(s) from the flyout menu.

Copy an item from one library to another by dragging its icon from the source library panel onto the target library panel. To move (rather than copy) an item from one library to another, hold down the Option or Alt key when dragging and dropping an item between libraries.

Managing library panels

You can close an individual panel by clicking its close box or choosing Close Library from its flyout menu. You can close all libraries at once by clicking the panel group's close box.

You can move panels into their own panel groups by dragging their tab outside their current panel groups. Likewise, you can combine library panels by dragging them by their tabs into another panel group (including those that contain non-library panels).

Chapter 7

Working with Color

*W*e see the world in glorious color. Yet not all publications take advantage of that fact, typically for budget reasons. But when you do have color available, take advantage of it: It brings a visual dimension that taps into our primal brains, creating a level of raw visual interest unmatched by anything else.

To take advantage of human beings' color "hot buttons," InDesign offers the ability to create and apply colors in many creative ways. But even if you can't use color in every document, some of the techniques described here — especially for tints and gradients — can help a staid black-and-white document get new panache through shades of gray.

Working with Colors

InDesign comes with only a few predefined colors: black, registration (black on each negative for the printing press), paper (white), none (transparent), cyan, magenta, yellow, red, green, and blue. You likely want to add a few of your own.

Creating color swatches

Before you can apply any colors — whether to bitmap images or to layout elements such as strokes, text, frames, and shapes — you must first define the colors, which you do in the Swatches panel (Window⇨Swatches or F5). You can also import colors from other Adobe programs and from some color images.

No matter how you define colors, you have a couple of decisions to make first:

✔ Do you want to create your own color by mixing basic colors like red, green, and blue (called RGB and typically used for documents like Web pages and PDF files displayed onscreen), or cyan, yellow, magenta, and black (called CMYK, or *process colors,* and typically used for printing presses and by inkjet printers)?

✔ Do you want to use a color from an ink maker like Pantone or Toyo? These colors — called *spot colors* — are typically used as an extra ink on your professionally printed document but can also be converted to the standard four-process colors and so are handy when you know the color you want when you see it.

All of the color-creation tools in InDesign support both process and spot colors, and all have access to the predefined colors like Pantone and Toyo as well as to the free-form color pickers for mixing CMYK or RGB colors. If you plan to print the color on its own plate, you need to use a predefined color so you know the printer can reproduce it. If you plan to color-separate a color into the four CMYK plates, it doesn't matter whether you use a predefined color or make one of your own. One advantage to using a predefined color is that it's easy to tell other designers what the color is; another is that you will get very close matches if you start with a predefined color and then end up having it color-separated in some documents and kept as a spot color in others.

All colors in the Swatches panel receive a unique name and are tracked by InDesign. That means each color is available to be used on any object in your document, with no risk of having slightly different variants. Plus, you can modify a swatch and ensure that all objects using that swatch are updated. You can also delete a swatch and tell InDesign which color to use in its place. Furthermore, when you print, you have control over how each color is handled (whether it is printed to its own plate, whether it is printed at all, and whether there should be any adjustments to its ink density or screening angle). Figure 7-1 shows the Swatches panel.

If no document is open when you create, edit, or delete colors, the new color palette becomes the default for all future documents.

To create your own color, go to the Swatches panel and select New Color Swatch from the flyout menu. The New Color Swatch dialog box shown in Figure 7-2 appears. Now follow these steps:

Figure 7-1:
The
Swatches
panel and
its flyout
menu.
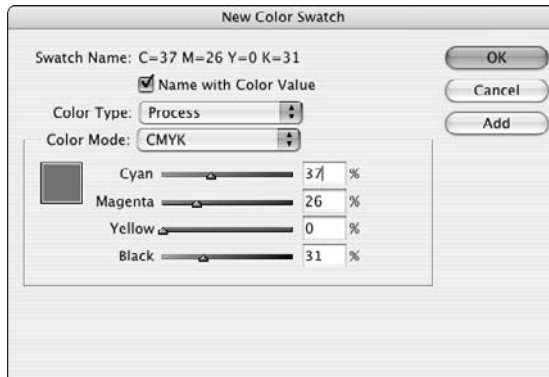
Figure 7-2:
The New
Color
Swatch
dialog box
lets you
define
colors.

1. **In the Swatch Name field, give your color a name that describes it,
   such as** Lemon Yellow **or** Blood Red**.**

   You can also select the Name with Color Value option, which uses the
   color values to make up the color name, as done for the colors under
   [Registration] in Figure 7-1. This option is the default setting for CMYK,
   RGB, and LAB colors; it is not available for swatch-based colors such as
   Pantone.

2. **In the Color Type pop-up menu, choose from Process or Spot.**

   The difference between process colors and spot colors is discussed
   later in this chapter; leave the color type at Process if you're not sure.

3. **In the Color Mode pop-up menu, choose the mixing system or swatch library (both are considered to be *color models*) you will use:**

   - **CMYK:** Cyan, magenta, yellow, and black are the colors used in professional printing presses and many color printers.

   - **RGB:** Red, green, and blue are the colors used on a computer monitor, for CD-based or Web-based documents, and for some color printers.

   - **Lab:** Luminosity, *A* axis, *B* axis, is a way of defining colors created by the international standards group Commission Internationale de l'Éclairage (the CIE, which translates to *International Commission on Illumination* in English).

   - **A swatch-based model:** Sets of premixed colors from various vendors, including ANPA, DIC, Focoltone, HKS, Pantone, Toyo Ink, and Trumatch for print documents, as well as a Web-specific set and sets specific to Windows and the Mac OS for onscreen documents.

   - **Other Library:** InDesign also has the Other Library option from which you can select any color, tint, or gradient swatch library file in the old Adobe Illustrator 8 format. (You can't use Illustrator's patterned swatches, but don't worry if the swatch file contains them: InDesign will simply ignore them.)

4. **For the CMYK, RGB, and Lab models, use the sliders to create your new color. (A preview appears in the box on the left.) For the swatch-based models, scroll through the lists of colors and select one.**

5. **If you want to create multiple colors, click Add after each color definition and then click Done when you're finished. To create just one color, click OK instead of Add. You can also click Cancel to abort the current color definition.**

The most popular swatch libraries used by North American professional publishers are those from Pantone, whose Pantone Matching System (PMS) is the de facto standard for most publishers in specifying spot-color inks. The Pantone swatch libraries come in several variations, of which InDesign includes 13. Most of the time, you'll use one of the following four:

- ✔ **Pantone Process Coated:** Use this library when you color-separate Pantone colors and your printer uses the standard Pantone-brand process-color inks. (These colors reproduce reliably when color-separated, while the other Pantone swatch libraries' colors often do not.)

- ✔ **Pantone Solid Coated:** Use this library when your printer will use actual Pantone inks (as spot colors) when printing to coated paper stock.

- ✔ **Pantone Solid Matte:** Use this library when your printer will use actual Pantone inks (as spot colors) when printing to matte-finished paper stock.

- ✔ **Pantone Solid Uncoated:** Use this library when your printer will use actual Pantone inks (as spot colors) when printing to uncoated paper stock.

The bad way to create colors

Many people try to use the Color panel (Window➪Color or F6) to define colors, which can be a mistake. At first, you might not realize that you can create colors from the Color panel. It shows a gradation of the last color used and lets you change the tint for that color on the current object. But if you go to its flyout menu and choose a color model (RGB, CMYK, or Lab), you get a set of mixing controls.

So what's the problem? Colors created through the Color panel won't appear in your Swatches panel, so they can't be used for other objects. They are called *unnamed colors* because they don't appear in the Swatches panel, but may be used by objects in a document, which can cause problems for when you print. (Adobe added them to InDesign to be consistent with how Illustrator defines colors — a foolish consistency.)

Fortunately, there is a way to prevent unnamed colors: If you go to the Color panel and modify a color without thinking about it, choose Add Unnamed Colors from the Swatches panel's flyout menu to add the modified color to the Swatches panel. Of course, if you forget to do this, you have an unnamed color, so it's best to think *Swatches panel* when you think about adding or editing colors instead of the more obvious *Color panel.* Even better, close the Color panel so you're not tempted to use it in the first place.

Similarly, don't use this InDesign feature: the ability to create colors by double-clicking the Stroke and Fill buttons on the Tools panel, using a Photoshop-style color picker. As with colors created in the Color panel, you can rectify this sin by adding any colors created this way to the Swatches panel by using the Swatches panel's Add Unnamed Colors menu item. Otherwise, you run the same risk as creating colors through the Color panel.

Color swatches based on the CMYK colors — such as Focoltone, Pantone Process, and Trumatch — will accurately color-separate and thus print accurately on a printing press because a printing press uses the CMYK colors. Other swatches' colors often do not color-separate accurately because they are supposed to represent special inks that may have added elements like metals and clays designed to give metallic or pastel appearances that simply can't be replicated by combining cyan, magenta, yellow, and black. Similarly, some colors (like several hues of orange and green) can't be accurately created using the CMYK colors.

Creating mixed colors

InDesign offers another type of color: mixed-ink color. Essentially, a mixed-ink color combines a spot color with the default process colors (cyan, magenta, yellow, and black) to create new color swatches. For example, you can combine 38 percent black with 100 percent Pantone 130C to get a darker version of Pantone 130C (called a *duotone,* though InDesign doesn't limit you to mixing spot colors with just black, as traditional duotones do).

To create a mixed-ink swatch, follow these steps:

1. **Select the spot color you want to begin with and then choose New Mixed Ink Swatch from the Swatches panel's flyout menu.**

   The New Mixed Ink Swatch dialog box appears, as shown in Figure 7-3.

Figure 7-3:
The New Mixed Ink Swatch dialog box lets you mix a selected spot color with any or all of the default process colors to create new shades and variations.
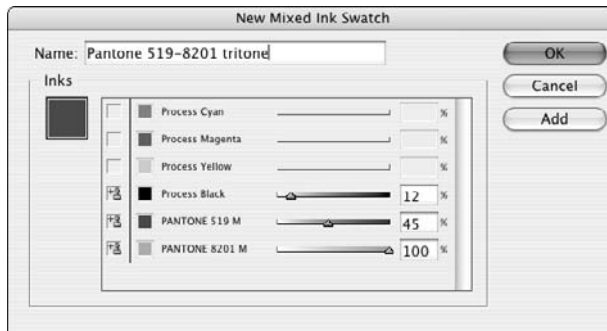
2. **Select the percentages of the spot color and any or all of the default process colors you want to mix and give the new color a name.**

3. **Click Add to add another mixed-ink swatch based on the current spot color.**

   If you're creating just one color, click OK instead of Add. You can click Cancel to abort the current mixed-ink color definition.

4. **Click OK when you're finished.**

There's a related option in the Swatches panel's flyout menu called New Mixed Ink Group. This lets you create a set of colors from the same mix. You get to set the initial percentage of each color you want in the mix and the final value, as well as how many increments of each color you want. InDesign then takes all this information and creates a bunch of color swatches that combine each of the colors at each level so you get a whole range of colors. The idea is to get a set of related colors created for you, such as a set of blue-green hues that range from light aqua to dark marine. Experiment with this expert feature to see what it can do for you.

Defining Tints

A *tint* is simply a shade of a color. InDesign lets you create such tints as separate color swatches — like any other color — so they're easy to use for multiple items. The process is easy:

1. **In the Swatches panel, select a color from which you want to create a tint.**

2. **Using the Swatches panel's flyout menu, select New Tint Swatch.**

   The New Tint Swatch dialog box, shown in Figure 7-4, appears.

3. **Click and drag the slider to adjust the tint, or type a value in a field on the right.**

4. **Click Add to create another tint from the same base color, and then click OK when you're finished. (If you're adding a single tint, there's no need to click Add; just click OK when done.)**

   Click Cancel if you change your mind about the current tint. Any new tint will have the same name as the original color and the percentage of shading, such as Sky Blue 66%.

   You can create a tint from a tint, which can be confusing. Fortunately, InDesign goes back to the original color when letting you create the new tint. Thus, if you select Sky Blue 66% and move the slider to 33%, you get a 33 percent tint of the original Sky Blue, not a 33 percent tint of the Sky Blue 66% (which would be equivalent to a 22 percent tint of the original Sky Blue).

You modify and delete tint swatches like any other color swatch, using the Swatches panel's flyout menu.

Figure 7-4:
The New Tint Swatch dialog box lets you define colors; a nearly identical dialog box named Swatch Options lets you edit them.

TIP
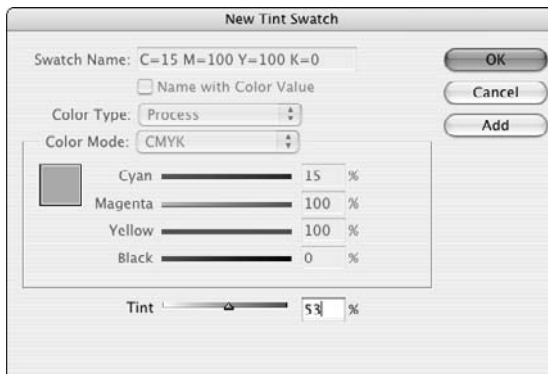
You can also apply tints to objects without creating a separate swatch for each tint. After applying the color (described later in this chapter), select the object and change the value in the Tint field of the Swatches panel, or use its pop-up menu's predefined tint values. Easy as pie!

Working with Gradients

A long-popular design technique is the gradient (also called a *blend* or *graduated fill*), which blends two or more colors in a sequence, going smoothly from, say, green to blue to yellow to orange. InDesign has a powerful gradient-creation feature that lets you define and apply gradients to pretty much any object in InDesign, including text, lines, frames, shapes, and their outlines (strokes).

Creating gradient swatches

In the Swatches panel, where you define colors and tints, you can also define gradients. Just select the New Gradient Swatch option in the flyout menu. You get the dialog box shown in Figure 7-5. The first two options are straightforward:

- ✔ Type a name for the gradient in the Swatch Name field. Picking a name is a bit more difficult than for a color, but use something like "Blue to Red" or "Bright Multihue" or "Logo Gradient" that has a meaning specific to the colors used or to its role in your document.

- ✔ In the Type pop-up menu, choose Linear or Radial. A linear blend goes in one direction, while a radial blend radiates out in a circle from a central point.
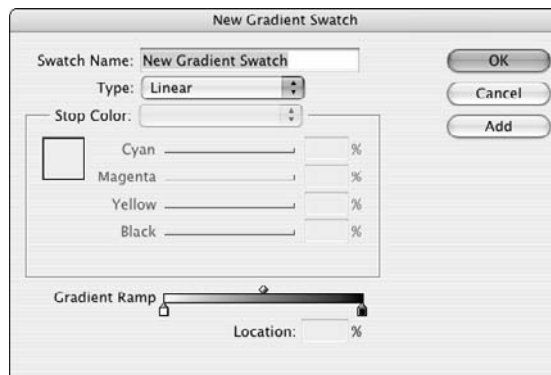
Figure 7-5:
The New Gradient Swatch dialog box.

Now it gets a little tricky. Follow these steps:

1. **Select a stop point — one of the squares at the bottom of the dialog box on either end of the gradient ramp that shows the gradient as you define it.**

   The stop points essentially define the start color (the stop point on the left) and the end color (the stop point on the right). With a stop point selected, you can now define its color.

2. **Choose what color model you want to use — select from CMYK, RGB, LAB, and Swatches in the Stop Color pop-up menu.**

   The area directly beneath the pop-up menu changes accordingly, displaying sliders for CMYK, RGB, or LAB, or a list of all colors from the Swatches panel for Swatches, depending on which model you choose.

3. **Create or select the color you want for that stop point.**

   You can select the [Paper] swatch — essentially, transparency or no color — as a stop point in a gradient. You can also click and drag swatches from the Swatches panel to the gradient ramp.

4. **Repeat Steps 1 to 3 for the other stop point.**

   Note that the color models for the two stop points don't have to be the same — you can blend from a Pantone spot color to a CMYK color, for example. (If a gradient mixes spot colors and process colors, InDesign converts the spot colors to process colors.)

You now have a simple gradient. But you don't have to stop there. Here are your other options:

- You can change the rate at which the colors transition by sliding the diamond icons at the top of the gradient ramp.

- You can create additional stop points by clicking right below the gradient ramp. By having several stop points, you can have multiple color transitions in a gradient. (Think of them like tab stops in text — you can define as many as you need.) You delete unwanted stop points by clicking and dragging them to the bottom of the dialog box.

Notice that there's a diamond icon between each pair of stop points — that means each pair can have its own transition rate.

When you create a new gradient, InDesign uses the settings from the last one you created. If you want to create a gradient similar to an existing one, click that existing gradient before selecting New Gradient Swatch from the flyout menu. InDesign copies the selected gradient's settings to the new one, which you can then edit. One reason to use this is to create, say, a radial version of an existing linear gradient.

The Swatches panel shows the actual gradient next to its name. The pattern also appears in the Fill button or Stroke button in the Tools panel if that gradient is currently selected as a fill or stroke, as well as in the Gradient button in that panel, whether or not it's currently applied as a fill or stroke.

Understanding the Gradient panel

Just as it does with unnamed colors, InDesign lets you create *unnamed gradients* — gradients that have no swatches. Unlike unnamed colors, you can use these to your heart's content because all colors in a gradient are converted to process colors and/or use defined spot-color swatches — so there are no unnamed colors in their output. The process is pretty much the same as creating a gradient swatch, except that you select an object and then open the Gradient panel (Window⇨Gradient). In that panel, you select a stop point and then choose a color to apply to it by clicking a color in the Swatches panel or in the Color panel. You create and adjust stop points here just as you do when defining a gradient swatch.

The difference? Gradients in the Swatches panel can be reused, whereas gradients applied through the Gradient panel cannot be. But you can add them to the Swatches panel by right-clicking or Control+clicking the gradient in the Tools panel's Fill or Stroke button, and then choosing Add to Swatches in the contextual menu that appears.

The Gradient panel can also manipulate gradient swatches: After you apply a linear gradient — whether via a gradient swatch or as an unnamed gradient — you can change the angle of the gradient, rotating the gradient within the object. Just type the desired degree of rotation in the Angle field to rotate the gradient's direction by the value. Negative values rotate counterclockwise, whereas positive values rotate clockwise.

Note that you can't rotate a radial gradient because it's circular and, thus, any rotation has no effect. That's why InDesign grays out the Angle field for radial gradients.

But you can still adjust the location of a radial gradient — as well as that of a linear gradient — by using the Gradient tool in the Tools panel. After applying a gradient to an object, select the Gradient tool and draw a line in the object, as shown in Figure 7-6:

- ✔ For a linear gradient, the start point of your line corresponds to where you want the first stop point of the gradient to be; the end point of the line corresponds to the last stop point. This lets you stretch or compress the gradient, as well as offset the gradient within the object. Also, the angle at which you draw the line becomes the angle for the gradient.

- ✔ For a radial gradient, the line becomes the start and end point for the gradient, in effect offsetting it.

Figure 7-6:
At left: The Gradient tool lets you set the offset, adjust the gradient length, and (for gradient blends) adjust the gradient angle. At right: The Gradient Feather tool acts like the Gradient tool but starts with transparent as the color.
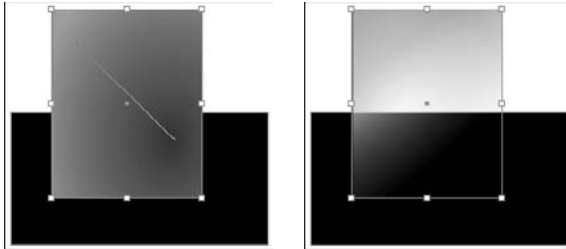
The new Gradient Feather tool — accessed through the Gradient tool's pop-out menu or via the shortcut Shift+G — acts just like the Gradient tool except that it starts with transparency as the initial "color," as shown in Figure 7-6. See Chapter 9 for more on gradient feather and other lighting effects.

Managing Swatches

When you create colors, tints, and gradients, it's easy to go overboard and make too many. You'll also find that different documents have different colors, each created by different people, and you'll likely want to move colors from one document to another. InDesign provides basic tools for managing colors in and across documents.

Editing swatches

It's easy to modify a swatch to change its settings: Just double-click it in the Swatches panel. (You can also choose Swatch options from the Swatches panel's flyout menu.) The Swatch options dialog box will appear, a clone of the New Color Swatch, New Tint Swatch, or New Gradient Swatch dialog box (based on what kind of swatch you double-clicked).

There is a slight difference between the New Swatch dialog boxes and the Swatch Option dialog boxes: The Swatch Option dialog boxes include the Preview option, which lets you see your changes in a selected object (if it's visible on-screen, of course) as you make changes in the Swatch Options dialog box.

Copying swatches

To duplicate a swatch, so you can create a new one based on it, use the Duplicate Swatch option in the Swatches panel. The word *copy* will be added to the name of the new swatch. You edit it — including its name — as you would any swatch.

REMEMBER

When selecting swatches for deletion or duplication, you can ⌘+click or Ctrl+click multiple swatches to work on all of them at once. Note that Shift+clicking selects all swatches between the first swatch clicked and the swatch that you Shift+click, whereas ⌘+click or Ctrl+click lets you select specific swatches in any order and in any location in the panel.

Deleting swatches

InDesign makes deleting swatches easy: Just select the color, tint, or gradient in the Swatches panel. Then choose Delete Swatch from the flyout menu, or click the trash can iconic button at the bottom of the Swatches panel.

Well, that's not quite it. You then get the Delete Swatch dialog box, which lets you either assign a new color to anything using the deleted swatch (the Defined Swatch option) or leave the color on any object that is using it but delete the swatch from the Swatches panel (the Unnamed Swatch option). (As explained earlier in this chapter, unnamed colors should be avoided, so if your document uses a color, keep its swatch.)

WARNING!

If you delete a tint and replace it with another color, any object using that tint will get the full-strength version of the new color, not a tint of it. Likewise, if you delete a color swatch that you've based one or more tints on, those tints will also be deleted if you replace the deleted swatch with an unnamed swatch. However, if you delete a color swatch and replace it with a defined swatch, any tints of that deleted swatch will retain their tint percentages of the replacement-defined swatch.

TIP

InDesign offers a nice option to quickly find all unused colors in the Swatches panel — the palette menu's Select All Unused option. With this option, you can delete all the unused colors in one fell swoop. Note that you don't get the option to assign each deleted color separately to another color in the Delete Swatch dialog box — they all are replaced with the color you select or are

made into unnamed colors. Because no object uses these colors, choosing Unnamed Swatch in essence is the same as replacing them with a color using the Defined Swatch option.

Sampling colors

You may wonder how you can use colors in your imported graphics for which InDesign can't find any swatch information, such as in TIFF files or photos embedded in a PDF file. As you might expect, InDesign provides a way to capture these colors: the Eyedropper tool. Here's how it works:

1. **In the Tools panel or Swatches panel, choose the Fill iconic button or Stroke iconic button.** It doesn't really matter which unless you will immediately create a shape or enter text after capturing the desired color; in that case, choose whichever aspect you'll want the new object or text to have the color applied to.

2. **Select the Eyedropper tool and then click on the graphic where the desired color is used.** The Fill or Stroke iconic button will now have that color. (If the Eyedropper tool is not visible in the Tools panel, look for the Measure tool, then click and hold down its icon to get the pop-up menu that lets you select the Eyedropper tool.)

3. **The Eyedropper tool changes to the Marker tool.** Any object you select with the Marker tool will have the color applied to its fill or stroke, depending on whether the Fill or Stroke iconic button is active. Note you can switch between the Eyedropper and Marker tools to select different colors and apply them by holding the Option or Alt key to get the Eyedropper tool back, then releasing it to switch to the Marker tool.

4. **To add the new, unnamed color to the Swatches panel, Control+click or right-click the Fill iconic button or Stroke iconic button (whichever has the captured color) and choose Add to Swatches from the contextual menu that appears.** Now you can edit and apply the captured color like any other color swatch.

The figure below shows a composite image that highlights the Eyedropper tool at center left and the Marker tool at right.
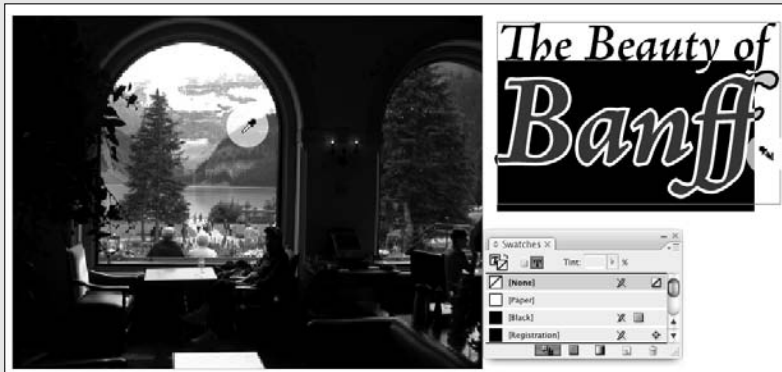
If you delete a swatch and replace it with an unnamed swatch, you can recapture that deleted swatch later by choosing the Add Unnamed Colors menu item in the Swatches panel's flyout menu.

Importing swatches

A quick way to import specific colors from another InDesign document or template is to click and drag the colors from that other file's Swatches panel into your current document or template.

You can import colors from other Creative Suite programs from which you have saved Adobe Swatch Exchange color library files, choosing Load Swatches from the Swatches panel's flyout menu. You can also import swatches directly from other InDesign documents. From the resulting dialog box, navigate to the file that contains the colors you want to import, select that file, and click Open.

When you import color swatches from other documents or Adobe Swatch Exchange files, InDesign brings in *all* the colors. You cannot choose specific colors to import.

Also, when you import a graphic file in PDF or EPS format, any named colors (swatches) in that file are automatically added to the Swatches panel.

Exporting swatches

You can do more than import swatches. InDesign also lets you save swatches into color library files for use by other Creative Suite 2 or 3 users. Just select the colors you want to save and then choose Save Swatches from the Swatches panel's flyout menu. You are asked to give the color library file a name before you save it.

InDesign does not include mixed-ink colors when you save swatches for use by other Creative Suite programs. Any selected such swatches are simply ignored.

Applying Swatches

Applying colors, tints, and gradients to objects in InDesign is easy. Select the object, click the Formatting Affects Text button or Formatting Affects Container iconic button in the Swatches or Gradient panel as appropriate. If you're using the Swatches panel, click the appropriate swatch; if you're using the Gradient panel, adjust the gradient as desired.

REMEMBER

When it comes to coloring graphics in InDesign, you can apply color and tints to grayscale and black-and-white bitmapped images, such as those in the TIFF and Photoshop formats. But you cannot color vector-based graphics (such as those in the Illustrator and EPS formats) or color bitmapped images.

Another way to apply colors, tints, and gradients is by selecting the object and using the Formatting Affects Text, Formatting Affects Content, Fill, or Stroke iconic buttons in the Tools panel to define what part of the object you want to color. You can use the Swatches or Gradients panels to select a swatch, or pick the last-used color and gradient from the Apply Color and Apply Gradient iconic buttons on the Tools panel, shown in Figure 7-7.

For tints, you can use a tint swatch, or you can simply apply a color from the Swatches panel and enter a tint value in the panel's Tint field.

Figure 7-7:
The Tools panel lets you choose what part of an object you want to color, as well as apply the last-used color or gradient.

Eyedropper tool
Fill button
Swap Fill and Stroke button
Stroke button
Default Fill and Stroke button
Formatting Affects Contents button
Formatting Affects Container button
Apply None button
Apply Gradient button

Apply Color button
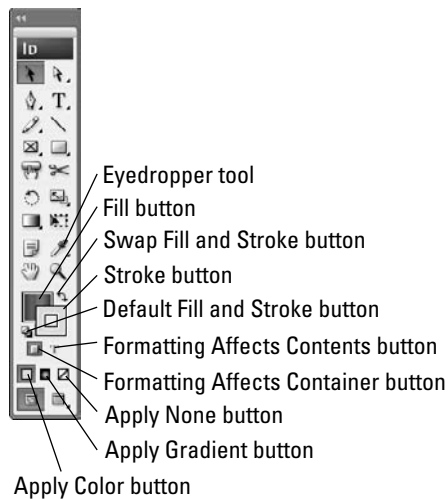
When applying color to text, you can apply it to all the text in the frame by using the Formatting Affects Text iconic button (which is what the Formatting Affects Contents iconic button is renamed when you select text), or to specific text by highlighting that text with the Type tool.

TIP

You can also apply color as part of your character and paragraph styles in the Character Color pane when creating or editing styles. See Chapter 14 for more on styles, and Chapters 15 through 17 for more on text formatting.

You can also apply colors and tints to gaps in strokes by using the Stroke panel's flyout menu (select Show Options and select a gap color). Open the Stroke panel by choosing Window⇨Stroke or by pressing ⌘+F10 or Ctrl+F10.

Part III
Object Essentials

The 5th Wave — By Rich Tennant

"I found these two in the multimedia lab morphing faculty members into farm animals."

In this part . . .

The rubber really hits the road when you've got your basic layout structure in place. Now you can focus on the meat of your documents: the objects that contain your text and graphics. It's amazing all objects you can create — from simple rectangles to complex curves. And it's equally amazing all the things you can do to objects, such as rotate them, align them, and apply special effects like drop shadows and directional feathers (you'll just have to read on to see what these are!). And you can even save a lot of these settings so you can apply them consistently to other objects later — a real timesaver that also ensures quality results. You'll find out about all that and more in this part.

Note that you can apply most of these effects to objects whether or not they already contain their graphics and text — so if you're a really structured kind of person, you'll probably create your basic object containers first and apply your effects to them and then bring in the text and graphics. But if you're more free-form in your approach, you'll likely bring in all your text and graphics and then start arranging the objects that contain them to produce your final layout. Either way, you'll apply the techniques you discover here.

Chapter 8

Creating Essential Elements

*T*he fundamental components of any layout are its objects. An *object* is a container that can (but doesn't have to) hold text or graphics, as well as display attributes such as color, strokes, and gradients. This chapter explains how to create these building blocks: frames, shapes, lines, and paths, as well as the strokes you apply to them.

Creating Frames and Shapes

When an object contains an imported graphic or text, or if an object is created as a placeholder for a graphic or text, it's referred to as a *frame* in InDesign. Otherwise, it is called a *shape*.

REMEMBER

The difference between frames and shapes is artificial, and because a shape can easily become a frame simply by placing text or graphics into it, it's easiest to think of shapes and frames as the same thing. I tend to use the word "frame" to mean either frames or shapes.

Designing pages in InDesign is largely a matter of creating and modifying frames and shapes, as well as modifying the text and graphics that the frames contain.

As Figure 8-1 shows, the Tools panel contains several tools for creating both shapes and frames:

✔ The Rectangle, Ellipse, and Polygon shape tools (the Ellipse and Polygon tools are available through the pop-up menu that appears if you click and hold on the Rectangle tool).

✔ The Rectangle Frame, Ellipse Frame, and Polygon Frame tools (the Ellipse Frame and Polygon Frame tools are available through the pop-up menu that appears if you click and hold on the Rectangle Frame tool).

✔ The Type tool (which can create rectangular text frames in addition to letting you work with text).

Frame tool

Type tool

Line tool
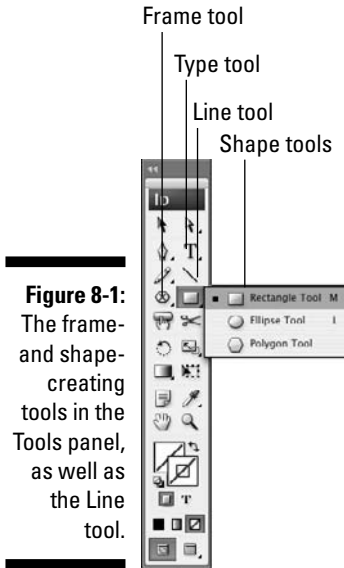
Shape tools

Figure 8-1: The frame- and shape- creating tools in the Tools panel, as well as the Line tool.

Rectangle Tool   M
Ellipse Tool   l
Polygon Tool

Here's how to create a frame (or shape):

1. **Select the desired tool from the Tools panel.**

   For the Polygon and Polygon Frame tools, you can set the shape and number of sides by double-clicking the tool and then using the dialog box that appears. Figure 8-2 shows that dialog box and example starburst.

2. **Move the mouse pointer anywhere within the currently displayed page or on the pasteboard.**

3. **Click and drag in any direction.**

   As you drag, a crosshair pointer appears in the corner opposite your starting point; a colored rectangle indicates the boundary of the frame. (The color will be blue for objects on the default layer; objects on other layers will have that layer's color. See Chapter 5 for more on layers.) You can look at the width and height values displayed in the Control panel or the Transform panel as you drag to help you get the size you want. Holding down the Shift key as you drag limits the tool to creating a frame or shape within a square bounding box.
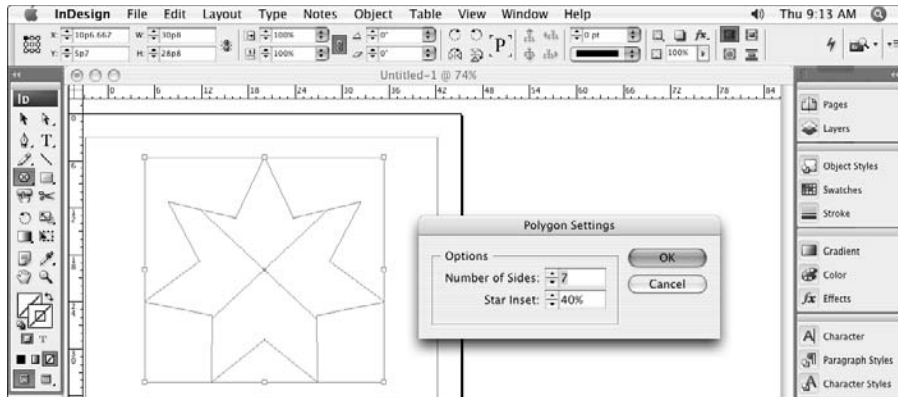
4. **When the frame is the size and shape you want, release the mouse button.**

Pretty easy, huh? At this point, you can begin typing in the frame, paste text or a graphic into it, or import a text or a graphics file, as Chapters 11 and 17 explain.

> **TIP** If you create a text frame with the Type tool, be sure not to click in an existing text frame when your intention is to create a new one. If you click within an existing frame when the Type tool is selected, the flashing cursor appears, and InDesign thinks you want to type text.

When any of the frame-creation tools is selected, you can create as many new frames as you want. Simply keep clicking, dragging, and releasing. After you create a graphics frame, you can modify it (without changing tools) by adding a border or a colored background or by applying any of the effects — such as rotation, shear, and scale — in the Control panel. You can also move or resize a graphics frame, but you have to switch to the Selection tool or the Direct Selection tool to do so. Chapter 9 explains how to resize, move, delete, and otherwise manipulate frames and other objects.

Reshaping Frames and Shapes

Sometimes, a frame or shape needs to be more than resized or moved. It needs to be reshaped. InDesign makes it easy to change an object's shape:

✔ The simplest way is to select an object with the Direct Selection tool, and then drag any of the handles or frame edges. Notice how the frame's shape actually changes, as show in Figure 8-3.

✔ To change a shape more radically, choose the desired shape from Object➪Convert Shape's submenu. Your choices are Rectangle, Rounded Rectangle, Beveled Rectangle, Inverse Rounded Rectangle, Ellipse, Triangle, Polygon, Line, and Orthogonal Line. (Note that if you choose Polygon, InDesign will use whatever the last polygon settings were, which you can see by double-clicking the Polygon or Polygon Frame tool. Also, if you try to convert a text frame into a line, InDesign will abort the action, telling you it can't do the conversion.)

✔ You can manually edit a shape by adding or removing anchor points — the points in a shape's edges that you can adjust, as described in the next section.

NEW FEATURE CS3

InDesign CS3 introduces a quick new way to switch between the Selection tool and the Direct Selection tool: Just double-click an object.

Figure 8-3:
Reshaping a frame by dragging its handle with the Direct Selection tool.
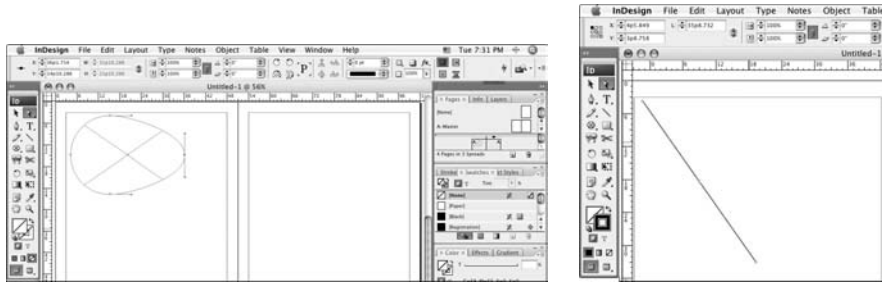
Creating Lines and Paths

When you're drawing the old-fashioned way, with pen and paper, you typi-cally use one tool to draw straight lines, curved lines, and free-form objects. InDesign is less flexible, using different tools for different kinds of lines. InDesign lets you create straight lines with the Line tool and zigzag lines, curved lines, and free-form shapes with the Pen and Type on a Path tools. (Those non-straight lines and free-form shapes are called *paths* in InDesign.)

Drawing a straight line

Although they're not as flashy or versatile as shapes and paths, lines can serve many useful purposes in well-designed pages. For example, you can use plain ol' vertical rules to separate columns of text in a multicolumn page or the rows and columns of data in a table. Dashed lines are useful for indicating folds and cut lines on brochures and coupons. And lines with arrowheads are handy if you have to create a map or a technical illustration.

Follow these steps to draw a simple, straight line:

1. **Select the Line tool (or press \).**

   (Figure 8-1 shows the Line tool.)

2. **Move the pointer anywhere within the currently displayed page or on the pasteboard.**

3. **Click and drag the mouse in any direction.**

   As you drag, a thin, blue line appears from the point where you first clicked to the current position of the cross-hair pointer. Holding down the Shift key as you drag constrains the line to a horizontal, vertical, or 45-degree diagonal line.

4. **When the line is the length and angle you want, release the mouse button.**

   Don't worry too much about being precise when you create a line. You can always go back later and fine-tune it.

When you release the mouse button after creating a line, the line is active. As illustrated in Figure 8-4, if the Selection tool was previously selected, the line appears within a rectangular bounding box, which contains eight resizing handles. If the Direct Selection tool was previously selected, moveable anchor points appear at the ends of the line. In either case, you have to choose the right tool if you want to change the shape or size of the bounding box or the line:

✔ The Selection tool lets you change the shape of the line's bounding box (which also changes the angle and length of the line) by dragging any of the resizing handles.

✔ The Direct Selection tool lets you change the length and angle of the line itself by moving anchor points on the frame.

Figure 8-4: A line selected with the Selection tool (left) and the Direct Selection tool (right).
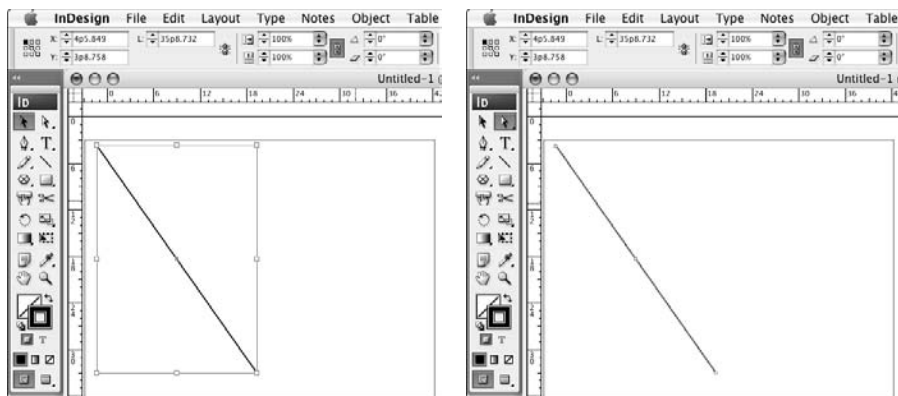
As long as the Line tool is selected, you can create as many new lines as you want. Simply keep clicking, dragging, and releasing.

When you create a line, it takes on the characteristics specified in the Stroke panel (Window➪Stroke, or ⌘+F10 or Ctrl+10), covered later in this chapter. When you first open a document, the default line width is 1 point. If you want to change the appearance of your lines, double-click the Line tool and adjust the Weight setting in the Stroke panel that appears. If you make this adjustment when no document is open, all new documents will use the new line settings.

Understanding paths

Paths are a lot more complex than lines, so it's important that you understand some of the theory behind paths because that knowledge will help you create and manipulate them more easily.

Every object you create with InDesign's object-creation tools is a *path*. Regardless of the tool you use to create a path, you can change its appearance by modifying any of four properties that all paths share:

✔ **Closure:** A path is either open or closed. Straight lines created with the Line tool and curved and zigzag lines created with the Pen tool are examples of open paths. Basic shapes created with the Ellipse, Rectangle, and Polygon tools and free-form shapes created with the Pen and Pencil tools are examples of closed shapes. A closed free-form shape is an uninterrupted path with no end points.

✔ **Stroke:** If you want to make a path visible, you can apply a stroke to it by selecting it with a selection tool, entering a Weight value in the Stroke panel (covered later in this chapter) (Window➪Stroke or ⌘+F10 or Ctrl+F10), and selecting a color from the Swatches panel (see Chapter 7). (An unselected, unstroked path is not visible.)

✔ **Fill:** A color, color tint, or gradient applied to the background of a path is called a *fill*. You apply fills by using the Swatches panel.

✔ **Contents:** You can place a text file or a graphics file in any path except a straight line. When a path is used to hold text or a graphic, the path functions as a frame. Although InDesign can place text or graphics in an open path, placing text and pictures in closed paths is far more common than placing them in open paths. In addition to putting text inside paths, you can also have text on the path itself, following its shape, as Chapter 17 explains.

No matter how simple or complicated, all paths are made up of the same components. Figure 8-5 shows the parts that make up a path:

✔ A path contains one or more straight or curved *segments.*

✔ An anchor point is located at each end of every segment. The anchor points at the ends of a closed path are called *end points.* When you create a path of any kind, anchor points are automatically placed at the end of each segment. After you create a path, you can move, add, delete, and change the direction of corner points.

✔ InDesign has two kinds of anchor points: *smooth points* and *corner points.* A smooth point connects two adjoining curved segments in a continuous, flowing curve. At a corner point, adjoining segments — straight or curved — meet at an angle. The corners of a rectangular path are the most common corner points.

✔ A *direction line* runs through each anchor point and has a handle at both ends. You can control the curve that passes through an anchor point by dragging a direction line's handles, as I explain a little later on.

Figure 8-5:
Anchor points can be corner or smooth, resulting in angular (top) or curved (bottom) connections between segments.

End point
Anchor point
Segment
End point
Anchor point
Segment

End point   Anchor point
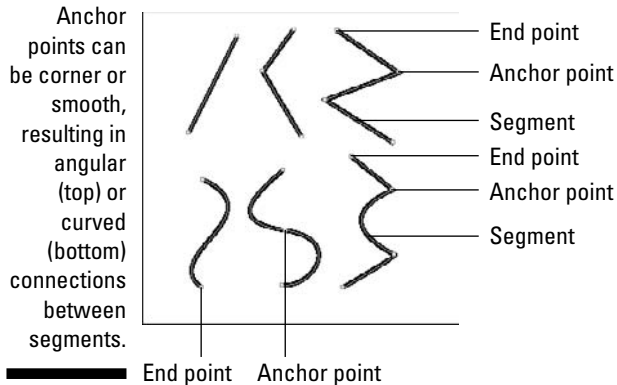
Drawing your own paths

Even if you're an artistic master with a piece of charcoal or a Number 2 pencil, you need to practice with the Pen tool for a while before your drawing skills kick in. The good news is that after you get comfortable using the Pen tool, you can draw any shape you can imagine. (Of course, if you can't draw very well in the first place, using the Pen tool won't magically transform you into a master illustrator!) If this is new terrain for you, start simply and proceed slowly.

TIP

When creating paths, use as few anchor points as possible. As you become more comfortable creating free-form paths, you should find yourself using fewer anchor points to create paths.

TIP

For an easy way to draw free-form shapes, use the Pencil tool. This tool simply traces the movement of your mouse (or pen tablet) as you move it, much like a pencil works on paper. Although not as exact as the Pen tool, the Pencil tool creates Bézier curves that you can later edit. Note that the Pencil tool is not meant for creating straight lines — unless you are capable of drawing perfectly straight lines by hand, that is.

Straight and zigzag lines

Follow these steps to draw lines with straight segments, such as a zigzag:

1. **Select the Pen tool.**

2. **Move the Pen pointer to where you want to start your line segment.**

3. **Click and release the mouse button. (Make sure you don't drag before you release the mouse button.)**

   An anchor point appears; it looks like a small, filled-in square.

4. **Move the Pen pointer to where you want to place the next anchor point.**

5. **Click and release the mouse button.**

   InDesign draws a straight line between the two anchor points. The first anchor point changes to a hollow square, and the second anchor point is filled in, which indicates that it is the active anchor point.

6. **Repeat Steps 4 and 5 for each additional anchor point.**

TIP

To reposition an anchor point after you click the mouse button but before you release it, hold down the spacebar and drag. Otherwise, you need to select it with the Direct Selection tool after you finish drawing the line and then click and drag it to its new location.

7. **To complete the path, ⌘+click or Ctrl+click elsewhere on the page or simply choose another tool.**

   If you ⌘+click or Ctrl+click, the Pen tool remains active, so you can continue creating new paths.

Curved lines

Knowing how to draw zigzag lines is fine, but chances are, you want to draw curved shapes as well. The basic process is similar to drawing straight segments, but drawing curved paths (technically called *Bézier paths*) is more complicated and will take you some time to get the hang of.

How smooth and corner points work

Bézier paths have two kinds of points to join segments: corner and smooth.

The two segments that form a smooth point's direction line work together as a single, straight line. When you move a handle, the line acts like a teeter-totter; the opposite handle moves in the opposite direction. If you shorten one of the segments, the length of the other segment doesn't change. The angle and length of direction lines determine the shape of the segments with which they're associated.

A corner point that connects two curved segments has two direction lines; a corner point that connects two straight segments has no direction lines; and a corner point that connects a straight and curved segment has one direction line. If you drag a corner point's direction line, the other direction line, if there is one, is not affected.

If you want to draw a continuously curvy path that contains no corner points and no straight segments, you should create only smooth points as you draw. Here's how:

1. **Select the Pen tool.**

2. **Move the Pen pointer to where you want to start the curve segment.**

3. **Click and hold down the mouse button.**

   The arrowhead pointer appears.

4. **Drag the mouse in the direction of the next point you intend to create and then release the mouse button.**

   As you drag, the anchor point, its direction line, and the direction line's two handles are displayed, as shown in Figure 8-6.

   If you hold down the Shift key as you drag, the angle of the direction line is limited to increments of 45 degrees.

TIP

Figure 8-6:
To create a smooth point when beginning a path, click and hold the mouse and drag in the direction of the next point.

Anchor point being dragged to next location

End point

Direction line

Direction line handle
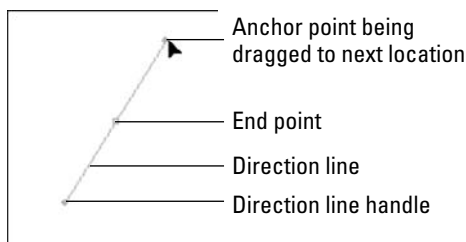
5. Move the Pen pointer to where you want to place the next anchor point — and end the first segment — and then drag the mouse.

If you drag in roughly the same direction as the direction line of the previous point, you create an S-shaped curve; if you drag in the opposite direction, you create a C-shaped curve.

6. When the curve between the two anchor points looks how you want it to look, release the mouse button.

Alternatively, when you want to connect curved segments to corner points (shown in Figure 8-7), move the Pen pointer to where you want to place the next anchor point — and end the first segment — and then press and hold Option or Alt as you click and drag the mouse. As you drag, the anchor point's handle moves, and the direction line changes from a straight line to two independent segments. The angle of the direction line segment that you create when you drag the handle determines the slope of the next segment.

7. Repeat Steps 5 and 6 for each additional desired curved segment.

8. To complete the path, ⌘+click or Ctrl+click elsewhere on the page or simply choose another tool.

If you ⌘+click or Ctrl+click, the Pen tool remains active, so you can create new paths.

You can also complete the path by clicking on the first point you created. This creates a closed path.

Figure 8-7:
Three corner points join four curved segments. The direction handles of the two right-most segments are visible.

Closed paths

A *closed path* is simply a path that ends where it began. When it comes to creating closed paths with the Pen tool, the process is exactly the same as for creating open paths, as explained earlier in this section, with one difference at the end:

✔ To create a straight segment between the end point and the last anchor point you created, click and release the mouse button.

✔ To create a curved segment, click and drag the mouse in the direction of the last anchor point you created, and then release the mouse button.

Just like an open path, a closed path can contain straight and/or curved segments and smooth and/or corner anchor points. All the techniques explained earlier in this chapter for drawing lines with curved and straight segments and smooth and corner points apply when you draw closed paths.

You can also, of course, edit and adjust your curves in InDesign. But this requires some more expertise with drawing tools such as those in Adobe Illustrator and is beyond the scope of this book. Check out *Illustrator CS3 For Dummies* by Ted Alspach or *Adobe InDesign CS3 Bible* by Galen Gruman (both by Wiley Publishing) for more details.

Applying Strokes

All objects have a stroke with a width of 0 built in, so you never really have to add strokes. But to use them, you need to modify them so they have some thickness onto which you can apply attributes such as colors and gradients.

Adding fills

The option to add a stroke to any shape becomes even more powerful when combined with the option to fill any shape with a color or tint. For example, adding a fill to a text frame is an effective way to draw attention to a sidebar.

Adding a fill to a shape is much like adding a stroke, and the options available for specifying color and tint are identical. The only difference is that you click the Fill button in the Tools panel or Swatches panel rather than the Stroke button.

Setting stroke appearance

The Stroke panel is where you give the stroke its width, as well as apply the type of stroke and other attributes:

> **NEW FEATURE CS3**
>
> The shortcut for the Stroke panel has changed in InDesign CS3: It is now ⌘+F10 or Ctrl+F10, no longer just F10. (F10 still works, though it may conflict with the Mac's Exposé software.)

1. **Select either of the selection tools and click the object whose stroke you want to modify.**

2. **If the Stroke panel is not displayed, show it by choosing Window⇨Stroke or by pressing ⌘+F10 or Ctrl+F10.**

   Figure 8-8 shows the panel.

Figure 8-8:
The Stroke panel (top) and the Swatches panel that is often used at the same time (bottom).
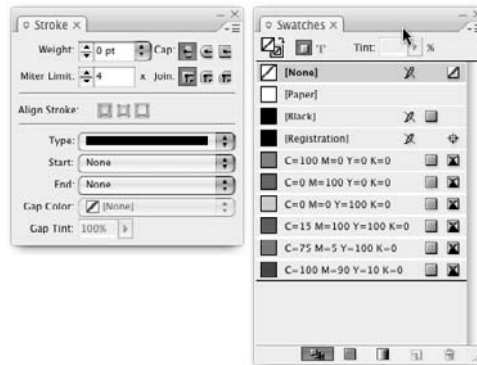
3. **To change the width of the stroke, enter a new value in the Weight field.**

   You can also change the Weight value by choosing a new value from the field's pop-up menu or by clicking the up and down arrows. (Each click increases or decreases the stroke by 1 point.)

4. **Set the Miter Limit.**

   The default of 4 is fine for almost all frames. You rarely need to use this feature, so don't worry about it.

5. **Click any of the three Cap iconic buttons to specify how dashes will look if you create a dashed stroke (covered in Step 9).**

   Experiment with them in your objects to see which looks best for your situation.

6. **Click any of the three Join iconic buttons to specify how corners are handled.**

   Again, experiment with these to see what works best for you.

7. **Choose an Align Stroke option.**

   The default is the first button, Align Stroke to Center, which has the stroke straddle the frame. You can also choose Align Stroke to Inside, which places the entire thickness inside the frame boundary, or Align Stroke to Outside, which places the entire thickness outside the frame boundary.

8. **You can also choose end points for your strokes (this only affects lines, not rectangles, ellipses, and other closed-loop shapes) by using the Start and End pop-up menus.**

   Figure 8-9 shows the options.

Figure 8-9: The Start options in the Stroke panel. (The End options are identical.)
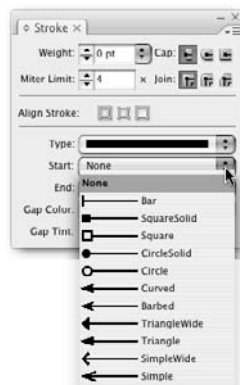
9. **To create a dashed line instead of a solid line, choose an option from the Type pop-up menu.**

   (These are also available from the Control panel.) Choose from 18 types of predefined dashes and stripes. The Gap Color and Gap Tint fields at the bottom of the Stroke panel become active as well, to let you choose a specific color and tint for the gaps in dashes and stripes.

Now that you have a visible stroke, you want to color it. Here's how:

1. **Select either of the selection tools and click the frame to which you want to add a stroke.**

2. **Click the Stroke button in the Swatches panel or Tools panel.**

3. **You now can click a color, tint, or gradient from the Swatches panel, or click one of the three boxes at the bottom of the Tools panel, which let you use (from left to right) the last-selected color, last-selected gradient, or None. (This removes the stroke's color, tint, or gradient.)**

For information about adding colors to the Swatches panel and applying colors to objects, see Chapter 7.

Creating stroke styles

InDesign lets you create custom strokes, known as *stroke styles,* in any of three types: dashed, dotted, and striped. To create custom dashes or stripes, choose the Stroke Styles option in the Stroke panel's flyout menu. In the resulting Stroke Styles dialog box, you can create new strokes, edit or delete existing ones, and import strokes from a stroke styles file, which you create by saving a document's strokes as a separate file for import into other documents. Stroke style files have the filename extension .inst.

Note that you cannot edit or delete the seven default stripe patterns shown in the Stroke Styles dialog box, nor can you edit or delete the default dash patterns — they're not even available in the dialog box. When you edit or create a stroke pattern, you get the New Stroke Style dialog box, shown in Figure 8-10. In the Name field, enter a name for your stroke. In the Type pop-up menu, you can choose to create (or convert a stripe you are editing to) a dashed, dotted, or striped stroke.
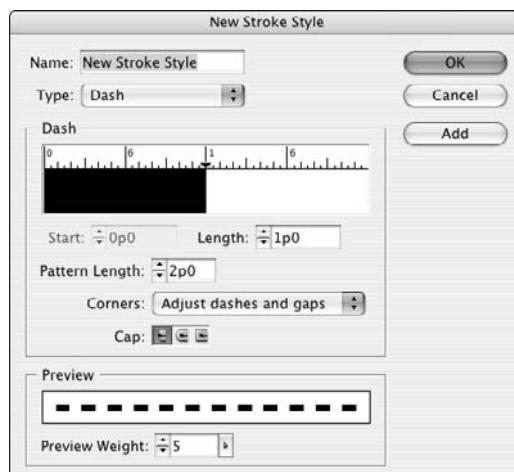
Figure 8-10: The dashes version of the New Stroke Style dialog box.

For dashes, you can resize the dash component by dragging the down-pointing triangle at the end of the dash in the ruler section. You can add dash segments by simply clicking the ruler and dragging a segment to the desired width. Or you can use the Start and Length fields to manually specify them. The Pattern Length field is where you indicate the length of the segment that will be repeated to create a dashed line.

In the Corners pop-up menu, you tell InDesign whether to adjust how the dashes and gaps are handled at corners; the default is Adjust Dashes and Gaps, a setting you should keep — it will make sure your corners have dash segments that extend along both sides of the corner, which looks neater. (Your other options are Adjust Dashes, Adjust Gaps, and None.) You can also choose a cap style and the stroke weight. The preview section of the pane lets you see your dash as you create or edit it.

For dots, you get a similar dialog box as for dashes. The Start and Length fields disappear, replaced with the Center field that determines where any added dots are placed on the ruler. (The initial dot, shown as a half-circle, starts at 0 and cannot be moved or deleted.) The Caps field is also gone.

To delete a dash or dot segment, just drag it to the left, off the ruler.

For stripes, you also get a similar dialog box. The principle is the same as for dashes: You create segments (in this case vertical, not horizontal) for the stripes by dragging on the ruler. However, the stripes version of the dialog box expresses its values in percentages because the actual thickness of each stripe is determined by the stroke weight — the thicker the stroke, the thicker each stripe is in the overall stroke.

In all three versions of the New Stroke Style dialog box, you click Add to add the stroke to your document, and then you can create a new stroke. When you're done creating strokes, click OK. (When editing a stroke, the Add button won't be available.)

Be sure to use the Preview Weight slider shown in Figure 8-10. This is available in all three versions of the New Stroke Style dialog box. It lets you increase or decrease the preview size so you can better see thin or small elements in your stroke.

Chapter 9

Manipulating Objects

● ●

In This Chapter

▶ Selecting objects

▶ Resizing and scaling objects

▶ Moving and deleting objects

▶ Keeping objects from printing

▶ Rotating, shearing, and flipping objects

▶ Replacing object attributes

▶ Applying corner options

▶ Using transparency and lighting effects

● ●

*F*rames, shapes, lines, and paths are the building blocks of your layout. But as anyone who ever played with Legos or Tinkertoys knows, it's how you manipulate the building blocks that results in a unique creation, whether it be a Lego house, a Tinkertoys crane, or an InDesign layout.

InDesign provides a lot of control over layout objects so that you can create really interesting, dynamic publications suited to any purpose. In this chapter, I explain the controls that apply to all objects.

This chapter focuses on various effects and actions that apply to any frame or path. Chapter 17 covers various actions specific to text frames and paths, while Chapter 19 covers actions specific to graphics frames. Chapter 8 explains how to add frames, shapes, lines, and paths in the first place. Chapter 11 explains how to align objects and precisely position them.

Selecting Objects

Before you can manipulate an object, you have to select it so that InDesign knows what you want to work on. To select an object (rather than its contents), use the Selection tool. Selected items will display their item boundary (a rectangle that encompasses the object) as well as eight small resizing handles (one at each of the four corners and one midway between each side of the item boundary). Figure 9-1 shows an example.

Figure 9-1: When you select a frame with the Selection tool, the bounding box is displayed with eight resizing handles.
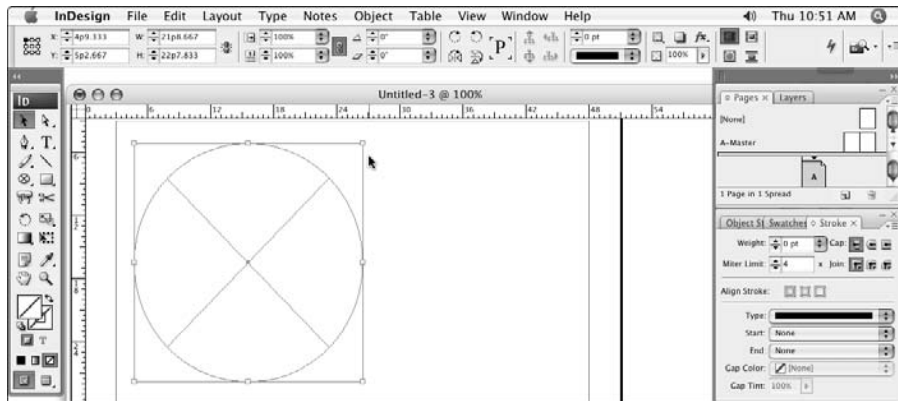
To select an individual object, just click it with the Selection tool. To select multiple objects, you have several options:

- ✔ Click the first object and Shift+click each additional object.
- ✔ Click and drag the mouse to create a selection rectangle (called a *marquee*) that encompasses at least part of each desired object. When you release the mouse, all objects that this marquee touches are selected.
- ✔ Choose Edit➪Select All or press ⌘+A or Ctrl+A to select all objects on the current spread.

TIP

If an object is on a master page and you're working on a document page, you must Shift+⌘+click or Ctrl+Shift+click the object to select it. How do you know whether an object is on a master page? Easy: If you try to select it by clicking and it doesn't become selected, it must be on a master page.

Choose View➪Show Frame Edges or press Control+⌘+H or Ctrl+H to see object edges if they aren't already visible.

NEW FEATURE CS3

The shortcut for View➪Show Frame Edges has changed in InDesign CS3 for Mac: It is now Control+⌘+H (the Windows shortcut, Ctrl+H, is unchanged).

These options are pretty easy, but it can get tricky when you want to select objects that overlap or are obscured by other objects (see Chapter 11 for more details on object stacking). So how do you select them?

One way is to use the Select Previous Object or Select Next Object iconic buttons in the Control panel. (If you Shift+click either button, InDesign jumps past four objects and selects the fifth one. If you ⌘+click or Control+click either button, InDesign selects to the bottommost or topmost object, respectively.)

NEW FEATURE CS3

If you use the Select Previous Object or Select Next Object iconic buttons and reach the top or bottom of the object stack, InDesign CS3 now cycles back. For example, if you reach the topmost object and click Select Previous Object, InDesign CS3 now moves to the bottommost object. In previous versions, you had to go all the way back to the bottom by using the Select Next Object button — there was no way to just loop around.

Another way to select buried objects is by using the Select submenu option in the Object menu.

The first four options in the Select submenu let you select another object relative to the currently selected object:

- ✔ First Object Above (Option+Shift+⌘+] or Ctrl+Alt+Shift+]) selects the topmost object.
- ✔ Next Object Above (Option+⌘+] or Ctrl+Alt+]) selects the object immediately on top of the current object.
- ✔ Next Object Below (Option+⌘+[or Ctrl+Alt+[) selects the object immediately under the current object.
- ✔ Last Object Below (Option+Shift+⌘+[or Ctrl+Alt+Shift+[) selects the bottommost object.

If no objects are selected, InDesign bases its selection on the order in which the objects were created, the topmost object being the one that was most recently created.

TIP

You can also access these four selection options by Control+clicking or right-clicking an object and choosing the Select menu from the contextual menu that appears.

The Select submenu has four other options:

- ✔ If you select an object's content (text or graphic), choose Object⇨Select⇨Container to choose the frame or path. Using this option is the same as selecting the object with the Selection tool.
- ✔ If an object has content (text or graphic) and you select it, choose Object⇨Select⇨Content to choose the content within the object. This is basically the same as selecting the frame with the Direct Selection tool (which I explain later in this chapter).
- ✔ If you select an object in a group of objects by using the Direct Selection tool, choose Object⇨Select⇨Previous Object in Group to navigate to the previous object in the group.
- ✔ Similarly, if you select an object in a group of objects by using the Direct Selection tool, choose Object⇨Select⇨Next Object in Group to navigate to the next object in the group.

TECHNICAL STUFF

Object creation order determines what is "previous" or "next" in a group.

The Control panel also provides iconic buttons to select the next or previous object, as well as to select the content or container (frame). These last two buttons appear only if you have selected a group. The buttons for selecting the next or previous object appear only if you are using the Direct Selection tool, while the buttons for selecting the content or container appear whether you are using the Selection or Direct Selection tool. (Yes, this is very confusing!) Figure 9-2 shows the buttons.

Figure 9-2:
The Control panel buttons for selecting the next and previous objects in a group, as well as for selecting contents versus containers.

Select Previous Object

Select Container

Select Next Object

Select Contents
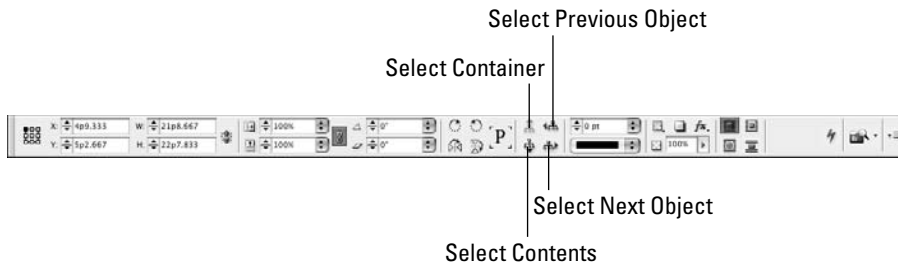
To deselect objects, just click another object, an empty part of your page, or the pasteboard. To deselect individual objects after you have selected multiple objects, Shift+click those you want to deselect.

REMEMBER

The Direct Selection tool lets you select any of the individual anchor points (and direction handles of free-form shapes and curved lines) on an object. If you use the Direct Selection tool to click an object that has a bounding box, the shape within is selected, and the bounding box is deselected. You use this tool to work on the contents independently of its container frame. You can also move a graphic within its frame by clicking within the object (see Chapter 19).

Resizing and Scaling Objects

Two closely related features are resizing and scaling. What's the difference? Resizing affects just the container — the frame or path — whereas scaling affects both the container and its contents.

Resizing objects

You resize objects in pretty much the same way you move them: by using the mouse for inexact sizes or the Control panel for precise sizes.

To resize an object with the mouse, click and drag one of the frame's (or path's) handles with the Selection tool. (Hold the Shift key as you drag to maintain the proportions of the frame.) Drag a corner handle to resize both the width and height or a side handle to resize just the height or width. This will leave the contents' size unchanged but change the size of the frame or path.

You can also enter new values in the W: and H: fields (for *width* and *height*) of the Control panel. This action also does not change the contents' size.

REMEMBER Remember those reference points for positioning an object from Chapter 1? They come into play for resizing objects as well. Basically, the object will grow or shrink starting from the selected reference point, called the *control point*. So if the upper-left reference point is selected and you enter greater W: and H: values, the object will add the extra width to the right and the extra height below. But if you choose the center reference point, it will grow on both sides as well as on the top and bottom, spreading the extra size evenly.

Another way to resize a frame — this doesn't apply to paths — is to choose Object➪Fit Frame to Content or press Option+⌘+C or Ctrl+Alt+C. For a graphic, this makes the frame the same size as the graphic itself. For text, this increases or decreases the depth of the text frame to match the depth of the text; it does not widen or narrow the frame.

NEW FEATURE CS3 Double-clicking one of a frame's four handles — the squares at the midpoints of each side — will resize the frame to the content in that axis. For example, double-clicking the left or right handles will fit the frame to the contents' width, while double-clicking the top or bottom handle will fit the frame to the contents' height. Likewise, double-clicking a corner handle will resize the frame in both directions.

Scaling objects

InDesign offers several ways to *scale* an object, resizing both its contents and its frame (or path):

✔ Enter percentage values in the Scale X Percentage and Scale Y Percentage fields of the Control panel. If the icon to the right of these fields shows a solid chain, adjusting one field automatically adjusts the other by the same percentage, creating proportional resizing. If the icon shows a broken chain, the two dimensions will be resized independently, distorting the contents. Click the iconic button to toggle between the unbroken chain and broken chain icons.

✔ You can also scale an object using the mouse. Select the object with the Selection tool, make sure the desired control point is active to control where the scaling operation starts, and then select the Scale tool. Now drag the mouse away from the object to enlarge it or into the object to reduce it. Objects scaled this way are scaled unproportionally; to scale the object proportionally, hold the Shift key when moving the mouse. (You can also use the Free Transform tool in the same way.)

✔ For graphics frames, use the content-fitting options in the Object menu and Control panel, described in Chapter 19.

Moving Objects

The easiest way to move an object is by using the mouse. With the Selection tool, click an object and drag it to a new location. When you release the mouse, the object will be deposited in the new location.

If you want to more precisely move an object, you can enter specific X: and Y: coordinates in the Control panel, as explained in Chapter 11.

Be sure to select the correct reference point to be used as the control point when entering coordinates. The little squares at the top-left of the Control panel and Transform panel represent the object's reference points (corners, side midpoints, and center). Click a reference point to make it the control point (it will turn black, the others will turn white); all coordinates are now based on this point.

Deleting Objects

Alas, not all the objects you create will survive all the way to the final version of your publication. Some will wind up on the cutting room floor. You can always move an object to the pasteboard if you're not sure whether you want to get rid of it altogether (objects on the pasteboard don't print). But when it's time to ax an object, oblivion is just a keystroke or two away.

If you delete a text or graphics frame or path, the contents are removed as well as the frame.

Here's how to delete objects: Using any selection tool, select the object or objects you want to delete and then press the Delete key or Backspace key. You can also delete a selected item by choosing Edit⇨Clear.

TIP

Choosing Edit⇨Cut or pressing ⌘+X or Ctrl+X also removes a selected object. However, in this case a copy of the object is saved to the Clipboard and can be pasted elsewhere (by choosing Edit⇨Paste or by pressing ⌘+V or Ctrl+V) until you cut or copy something else or you shut down your computer.

Preventing Objects from Printing

InDesign lets you prevent a specific object from printing. To do so, select the object with the Selection or Direct Selection tool, open the Attributes panel (Window⇨Attributes), and then select the Nonprinting check box. (The other settings in this panel duplicate stroke settings covered in Chapter 8.)

You use this feature for comments and other elements that should not print but that the designer needs to have visible on-screen. Another approach to nonprinting objects is to place them all on a layer and make the entire layer nonprinting, as explained in Chapter 5.

Transforming Objects

InDesign offers several tools and methods for transforming objects. I discuss resizing, scaling, and moving earlier in this chapter, but there are several other useful transformation tools, including rotating, shearing (skewing), flipping, and reshaping.

Rotating is just spinning an object around. Shearing is a little more complicated: Shearing skews an object (slanting it in one direction) while also rotating the other axis at the same time. Regardless of whether you use the mouse or numeric controls to apply rotation and/or shearing to graphics, you first need to follow these steps:

1. **Select the Selection tool.**

2. **Click the object you want to modify.**

3. **If you want, change the object's control point (by default it's the upper-left corner of a frame or shape).**

   You can change the control point by clicking one of the little black boxes — the reference points — in the upper-left corner of the Control panel.

4. **Choose the appropriate tool — Rotate, Shear, or Free Transform — or use the flip options in the Control panel.**

   Figure 9-3 shows the Tools panel and Control panel iconic buttons for these controls.

TIP

If you hold down the Option or Alt key while using a transformation tool, the modification will be performed on a copy of the selected object, rather than on the object itself.

Scale Y Percentage field

Scale X Percentage field

Rotation Angle field

Shear X Angle field

Rotate 90° Clockwise button

Rotate 90° Counterclockwise button
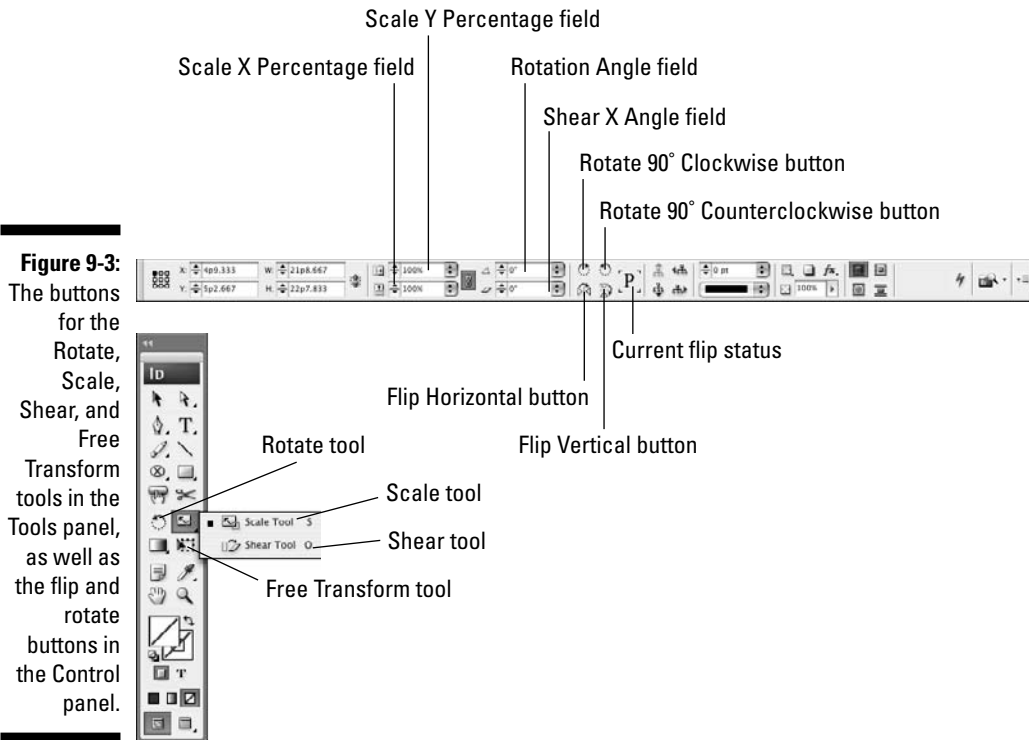
Figure 9-3:
The buttons for the Rotate, Scale, Shear, and Free Transform tools in the Tools panel, as well as the flip and rotate buttons in the Control panel.

Current flip status

Flip Horizontal button

Flip Vertical button

Rotate tool

Scale tool

Shear tool

Free Transform tool

Rotating objects

After you have selected the Rotate tool, click and drag a selected object to rotate it — the object will rotate following your mouse movement. (Holding down the Shift key while dragging limits rotation increments to multiples of 45 degrees.)

For more precise rotation, use the Control panel. You can change the angle of a selected object by entering a value in the Rotation field. If you choose to enter a value in the Rotation field, positive values rotate the selected item counter-clockwise around the control point; negative values rotate it clockwise.

Or you can choose one of the predefined angles from the Rotation Angle field's pop-up menu, or choose any of the three rotation options — Rotate 180°, Rotate 90° CW, and Rotate 90° CCW — in the Control panel's flyout menu.

Using the Free Transform tool

Advanced users will like the Free Transform tool. When you select this tool, InDesign lets you scale, rotate, and resize — but not shear — selected objects — as follows:

✔ If you click within the frame, you can move the object by dragging it.

✔ If you select a frame handle (whether corner or midpoint), you can resize the object by dragging.

✔ Finally, if you move the mouse very close to a frame handle, you will see a curved arrow, which indicates that you can rotate the object around that object's center point.

Having a tool that does more than one thing can be confusing, but once you get the hang of it, it sure beats constantly changing tools!

REMEMBER

If you choose one of these flyout menu options, the current angle of the selected object is added to the applied angle. For example, if you choose Rotate 90° CCW (counterclockwise), an object that's currently rotated 12 degrees will end up with a rotation angle of 102 degrees.

REMEMBER

No matter what method you choose to rotate an object, the center of rotation will be whatever control point is selected in the Control panel.

To "unrotate" an object, enter a Rotation Angle value of **0**.

Shearing objects

After you have selected the Shear tool, click and drag a selected object to shear it. (Holding down the Shift key constrains the selected object's rotation value to increments of 45 degrees.) If you drag the mouse in a straight line parallel with one set of edges (such as the top and bottom), you skew the graphic (just slant it in one direction). But if you move the mouse in any other direction, you slant the object's edges closest to the direction that you move the mouse the furthest and rotate the rest of the graphic. Give it a few tries to see what happens.

As with other functions, you can also use the Control panel for more precise control. Just enter a Shear X Angle value in the Control panel or choose a pre-defined value from the field's pop-up menu. Positive shear values slant an object to the right (that is, the top edge of the object is moved to the right), whereas negative values slant an object to the left (the bottom edge is moved to the right). You can enter shear values between 1 and 89 (although values above 70 cause considerable distortion).

Note that when you use the Shear tool, you change the selected object's angle of rotation *and* skew angle simultaneously. If you use the mouse, you

can in effect get different skew and rotation angles based on how you move the mouse, but if you use the Control panel, both the skew and rotation will have the same angles applied.

To "unshear" an object, enter a Shear X Angle value of **0**.

Flipping objects

The Object menu has two flipping commands: Object⇨Transform⇨Flip Horizontal and Object⇨Transform⇨Flip Vertical. They are also available in the Control panel as iconic buttons.

These controls let you make a mirror image of a selected object and its contents. If you choose Flip Horizontal, the graphic is flipped along a vertical axis (that is, the right edge and left edge exchange places); if you choose Flip Vertical, the object is flipped upside down. (You're not making a flipped copy of the select object, but actually flipping the selected object.)

As with other tools, the invisible line over which an object is flipped is based on what reference point is currently active as the control point for that object.

In InDesign CS3, the Control panel now displays iconic buttons for Flip Vertical and Flip Horizontal, as well as a preview of the current object's flip status (look for the large *P* in the panel when an object is selected; it's to the right of the two flip buttons). The *P* changes appearance so it is flipped the same way as the selected object.

Repeating transformations

Whatever transformations you use, you can apply them repeatedly. InDesign remembers the effects that you apply to frames via the Control panel, Transform panel, and transform tools. Choose Object⇨Transform Again⇨ Transform Again (Option+⌘+3 or Ctrl+Alt+3) to repeat the last transformation on the selected object (it can be a different object than you last applied a transformation to).

Or choose Object⇨Transform Again⇨Transform Sequence Again (Option+ ⌘+4 or Ctrl+Alt+4) to apply all recent transformations to a selected object. That sequence of transactions stays in memory until you perform a new transformation, which then starts a new sequence, so you can apply the same transformation to multiple objects.

Two other transform-again options are available through the Object⇨ Transform Again menu option's submenu: Transform Again Individually and Transform Sequence Again Individually. You use these on groups; they work like the regular Transform Again and Transform Sequence Again options but

apply any effects to each object individually within the group. For example, choosing Transform Again to a group might rotate the entire group as if it were one unit, but choosing Transform Again Individually would rotate each object in the group separately, not the group as a unit. Try it and see exactly what it does!

Replacing Object Attributes

A really painstaking task in any layout is going through it to fix formatting to frames, lines, or other objects once the design standards have changed. InDesign has a very handy way to apply object formatting consistently to objects — the object styles feature described in Chapter 10 — but even if you use these styles, you will still have local formatting applied to at least some objects.

That's where the Object pane of the Find/Replace dialog box comes in, letting you replace attributes throughout your document, no matter what they are applied to. Figure 9-4 shows that pane.
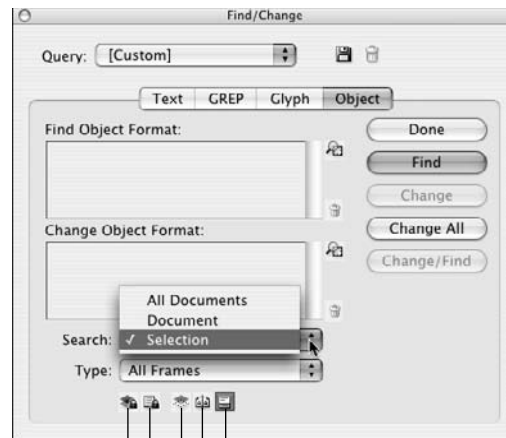
Figure 9-4:
The Object pane of the Find/Change dialog box.

Include Locked Stories
Include Footnotes
Include Locked Layers
Include Master Pages
Include Hidden Layers

Here's how it works:

1. **Open the Find/Change dialog box by choosing Edit⇨Find/Change, and then go to the Object pane.**

2. **Select the desired object attributes by clicking the Object Find Format Settings iconic button to the left of the Find Object Format list. In the dialog box that displays (refer to Figure 9-5), select the attributes to search (choose one category at a time from the list at left and then set the desired parameters in the pane that appears), and click OK when you're done.**

   This dialog box is nearly identical to the New Object Style dialog box covered in Chapter 10. They'll appear in that Find Object format list. (Highlight an attribute in the list and click the Clear Object Find Format Settings iconic button — the trashcan icon — if you want to remove an attribute from your search.)

3. **If you're replacing attributes, click the Object Format Settings iconic button to the right of the Change Object Format list.**

   These controls work like the Find Object Format controls.

4. **Limit or expand the search range by choosing an option from the Search pop-up menu: Selection, Document, and All Documents. Also choose the type of frames to search in the Type pop-up menu: All Frames, Text Frames, Graphic Frames, and Unassigned Frames. Finally, to determine the scope of your search, select or deselect any of the six buttons at the bottom of the pane.**

   From left to right, the five buttons are Include Locked Layers, Include Locked Stories, Include Hidden Layers, Include Master Pages, and Include Footnotes. Note that the first two buttons apply only to finds; you cannot change the formatting of locked objects. (If an icon's background darkens, it is selected.)

Figure 9-5:
The Find Object Format Options dialog box (the Change Object Format dialog box is identical).
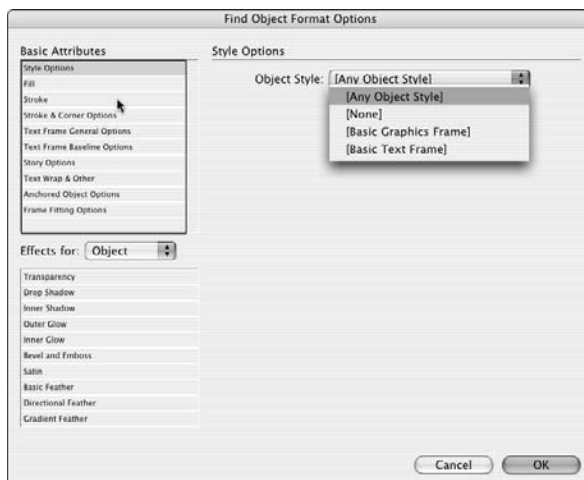
5. **Click Find, Change, Change All, or Change/Find as desired to perform your search and/or replace operation.**

6. **Click Done when done.**

Making Fancy Corners

Anytime you're working on an object that has any sharp corners, you have the option to add a little pizzazz to those corners via InDesign's Corner Options feature (Object➪Corner Options). Five built-in corner options, shown in Figure 9-6, are available. Note that if the shape contains only smooth points, any corner option you apply won't be noticeable.

Figure 9-6:
The Corner Options dialog box lets you apply any of five effects to frame and path corners. From left to right: None, Fancy, Bevel, Inset, Inverse Rounded, and Rounded.
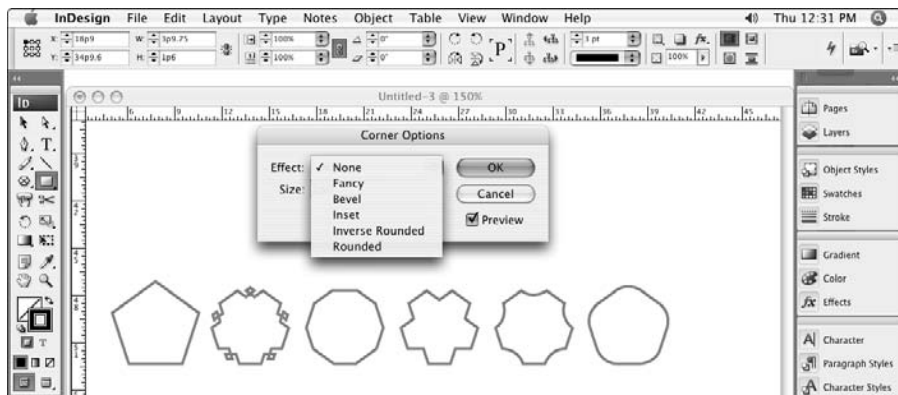
To add a corner option:

1. **Select either of the selection tools and click the object to which you want to add a corner effect.**

2. **Choose Object➪Corner Options to display the Corner Options dialog box.**

   Select the Preview check box to view changes as you make them.

3. **Choose an option from the Effect pop-up menu.**

4. **Enter a distance in the Size field.**

   The Size value determines the length that the effect extends from the corner.

5. **Click OK to close the dialog box and apply your changes.**

TIP

If you can't see a corner effect after applying one, make sure that a color is applied to the stroke or try making the object's stroke thicker. Increasing the Size value in the Corner Options dialog box can also make a corner effect more visible.

NEW FEATURE CS3

The Corner Options menu option and dialog box had been called Corner Effects in previous versions of InDesign.

Using Transparency and Lighting Effects

InDesign was a pioneer in the use of transparency effects on objects. These effects let you overlay objects without having them completely be obscured, allowing for very interesting visual effects such as fades and shadows.

NEW FEATURE CS3

InDesign CS3 takes the next step by adding much richer controls over transparency and lighting, so you can now create effects such as embossing and beveled edges *and* control the intensity and direction of shadows and light. As part of these enhancements, you'll find a significantly revised interface for transparency and related controls, not the least of which is the renaming of the Transparency panel to the Effects panel.

Basic transparency

One of InDesign's most sophisticated tools is its set of transparency options, which let you make objects partially transparent. You apply transparency with the Effects panel (Window➪Effects or Shift+F10), by choosing Object➪Effects➪Transparency, or by clicking the Effects iconic button in the Control panel and choosing Transparency from its pop-up menu.

The first option displays the Effects panel, which takes the least screen space and is best used for simple operations. The other options open the more complex and larger Effects dialog box. (Be sure that the Transparency pane is visible in the Effects dialog box; if not, click the Transparency option in the option list at left.)

Figure 9-7 shows the panel as well as a text title that uses transparency as it overprints a background photo. Notice how the semi-transparent text fades away toward the top and is brighter toward the bottom. Figure 9-8 shows the dialog box.

Figure 9-7: The Effects panel and its flyout menu (right), as well as transparency applied to the image and text (the original objects are at left).
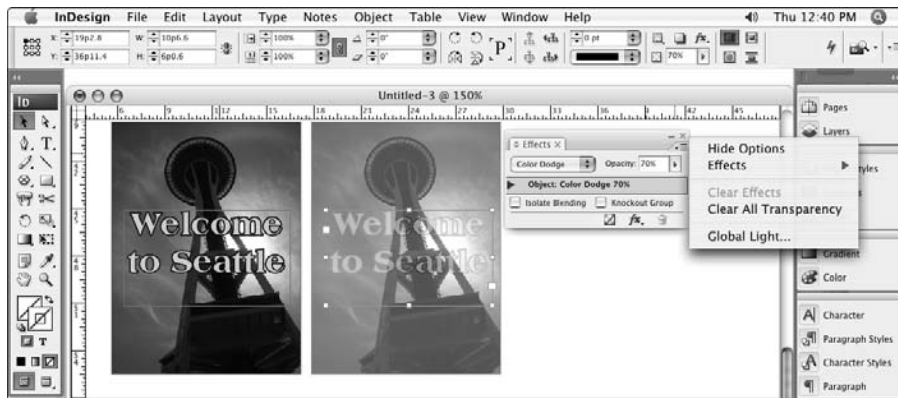
Figure 9-8: The Effects dialog box.
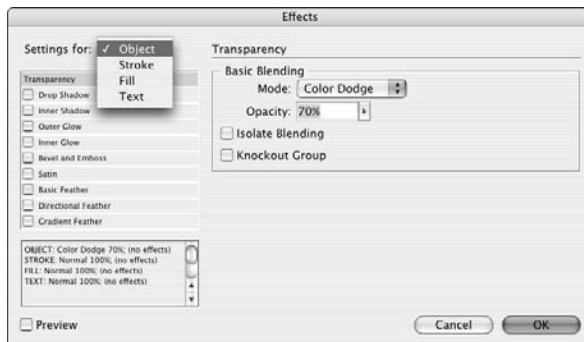
In the Opacity field of the Effects panel or Effects dialog box's Transparency pane, enter a value or choose one from the pop-up menu. A value of 0 is completely invisible, whereas a value of 100 is completely solid.

You cannot apply transparency to text selections or to entire layers, but InDesign CS3 now lets you apply different transparency settings to an object's contents, fill, and stroke, as well as to the object itself. You do so by choosing the desired component in the list in the Effects panel or using the Settings For pop-up menu in the Effects dialog box. (If you see only Object listed in the Effects panel, click the right-facing triangle to its left to display the rest.)

If you want more than basic transparency, you'll find a lot of other options. Most are for experts, but a few are worth describing. One is the set of 16 transparency types — called *blending modes*. (Photoshop and Illustrator users will recognize these expert options.) You access these in the pop-up menu in the Effects panel or via the Mode pop-up menu on the Effects dialog box's Transparency pane. The differences among them can be subtle or

extreme, depending on a variety of issues. You should experiment with them to see what effect works best in each case.

The Difference, Exclusion, Hue, Saturation, Color, and Luminosity modes do not blend spot colors — only process colors.

You have two other options in the Effects panel and in the Transparency pane of the Effects dialog box:

✔ **Isolate Blending** restricts the blending modes to the objects in a group, instead of also applying them to objects beneath the group. This can prevent unintended changes to those underlying objects.

✔ **Knockout Group** obscures any objects below the selected group. But those objects are still affected by any blend mode settings applied to the group, unless Isolate Blending is also checked.

Using drop shadows and inner shadows

The Effects panel and dialog box, as well as the Object➪Effects menu command, now give you access to a bunch of other lighting features, including drop shadows. In the panel, choose Effects➪Drop Shadow from the flyout menu, or choose Drop Shadow from the *fx* iconic button's pop-up menu. In the Effects dialog box, select Drop Shadow from the option list at left. Or just press Option+⌘+M or Ctrl+Alt+M. No matter how you get there, you'll see the following options in the Drop Shadow pane, shown in Figure 9-9:
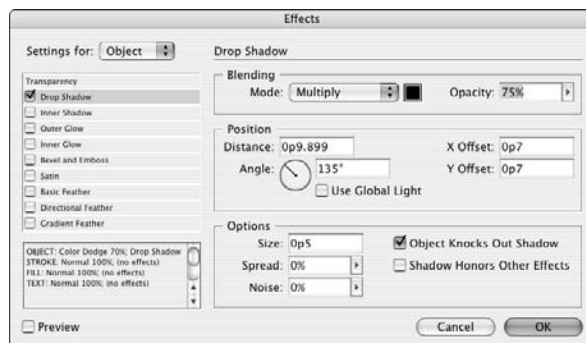
Figure 9-9: The Drop Shadow pane of the Effects dialog box.

✔ Choose what component of the object to apply the drop shadow to by using the Settings For pop-up menu. (You can apply multiple drop shadows, one to each component of an object.)

✔ Select the Drop Shadow check box option to turn on the drop shadow function for the selected component.

✔ Select a lighting type (technically, a *blend mode*) by choosing one of the 16 options in the Mode pop-up menu. (These are the same blending modes used in transparencies.)

✔ Specify the opacity by entering a value in the Opacity field — 0% is invisible, whereas 100% is completely solid.

✔ Specify the shadow's position relative to the object by using the X Offset and Y Offset fields. A positive X Offset moves the shadow to the right; a positive Y Offset moves the shadow down. Negative values go in the other direction.

✔ Specify the shadow's size by entering a value in the Distance field (formerly named Blur in previous versions of InDesign) — this blurs a copy of the text used in the drop shadow to make it look like it was created by shining light on solid letters.

✔ Choose a lighting angle in the Angle field or use the mouse to move the direction within the circle to determine the direction of the shadow. You can also select the Use Global Light option, which then uses whatever settings you define in the Global Light dialog box — a handy way to have consistent settings for all objects. (Choose Object➪Effects➪Global Light, or choose Global Light from the Effects panel's flyout menu, to open the Global Light dialog box.)

✔ Choose a color source — Swatches, RGB, CMYK, or Lab — from the Color pop-up menu in the Effect Color dialog box, which you get by clicking the color swatch to the right of the Mode pop-up menu, and then select a color from the sliders or swatches below that menu. You get sliders for RGB, CMYK, and Lab colors, or a set of previously defined color swatches if you selected Swatches in the Color pop-up menu.

✔ Adjust the other settings, if desired, to control other, expert drop shadow characteristics: Size, Spread, Noise, Object Knocks Out Shadow, and Shadow Honors Other Effects.

✔ To see the effects of your various setting adjustments in the actual layout, check the Preview option. (Because the Effects dialog box is so big, you'll likely need a big monitor to have room for both the dialog box and the object you're applying the effects to.)

There's a new shadow option in InDesign CS3: inner shadows. It works pretty much like drop shadows, with a nearly identical pane in the Effects dialog box. The visual difference is that an inner shadow is contained within the object, as if the frames were a wall blocking the shadow, whereas a drop shadow occurs outside the frame, as if the frame were casting a shadow outside.

Using feathering and other lighting effects

A similar option to drop shadows is feathering, which essentially softens the edges of objects. There are three types of feathering available:

✔ **Basic feathering:** These are the options that previous versions of InDesign offered.

✔ **Directional feathering:** This adds the ability to control the direction of the feathering as well as separate feather widths for each side, creating a smeared-border effect.

✔ **Gradient feathering:** This adds a gradient effect to the feathered area.

The other new effects are outer glow, inner glow, bevel and emboss, and satin. Figure 9-10 shows examples of each.

You apply them the same ways as you do drop shadows, selecting the object component in the Settings For pop-up menu and modifying the various controls such as opacity, light angle and distance, blending mode, and effect size, as appropriate for the specific effect. Once you get a hang for transparency and drop shadows, it's easy to use the other effects.

Figure 9-10:
Various effects applied to a set of objects. Top row: The original object, drop shadow, and inner shadow. Second row: Basic feather, directional feather, and gradient feather. Third row: Outer glow and inner glow. Bottom row: Bevel and emboss, and satin.

Chapter 10

Organizing Objects

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*Y*ou use objects throughout your layout: lines, text frames, graphics frames, shapes, and so forth. A big part of working with them involves organizing them — deciding when to group them together, when to lock them in location, how to arrange objects with others, and so on. That's where this chapter comes in.

Then I discuss a powerful new feature called *object styles* that lets you save object attributes. Object styles let you organize your settings so you can apply them to other objects for consistent, easy formatting.

Finally, I show you how to manage objects' relations with their source files, so you can make sure you're using the correct version of your graphics and text.

Combining Objects into a Group

Groups have many uses. For example, you might create a group to

✔ Combine several objects that make up an illustration so that you can move, modify, copy, or scale all objects in a single operation.

✔ Keep a graphics frame and its accompanying caption (text) frame together so that, if you change your mind about their placement, you can reposition both objects at once.

✔ Combine several vertical lines that are used to separate the columns of a table so that you can quickly change the stroke, color, length, and position of all lines.

InDesign lets you combine several objects into a group. A group of objects behaves like a single object, which means that you can cut, copy, move, or modify all the objects in a group in a single operation.

To create a group, select all the objects (which can include other groups) that you want to include in your group and then choose Object⇨Group or press ⌘+G or Ctrl+G.

Keep in mind the following when creating groups:

- ✔ If you create a group from objects on different layers, all objects are moved to the top layer and stacked in succession beneath the topmost object.

- ✔ You cannot create a group if some of the selected objects are locked and some are not locked. All selected objects must be locked or unlocked before you can group them. (Locking and unlocking objects are covered in the following section.)

If you want to manipulate a group, choose the Selection tool and then click any object in the group. The group's bounding box appears. Any transformation you perform is applied to all objects in the group.

If you want to manipulate a specific object in a group, use the Direct Selection tool to select that object. If you want to change something that requires the Selection tool be active, switch to it by selecting the Selection tool or simply by double-clicking the object. (See Chapter 9 for more details on selecting objects.)

If you remove an object from a group that had transparency applied (via cut and paste or copy and paste), that pasted object will not retain the group's transparency settings.

After creating a group, you may eventually decide that you want to return the objects to their original, ungrouped state. To do so, simply click any object in the group with the Selection tool and then choose Object⇨Ungroup or press Shift+⌘+G or Ctrl+Shift+G. If you ungroup a group that contains a group, the contained group is not affected. To ungroup this group, you must select it and choose Ungroup again.

Locking Objects

If you're certain that you want a particular object to remain exactly where it is, you can select Object⇨Lock Position or press ⌘+L or Ctrl+L to prevent the object from being moved. Generally, you want to lock repeating elements such as headers, footers, folios, and page numbers so that they're not accidentally moved. (Such repeating elements are usually placed on a master page; you can lock objects on master pages, too.)

A locked object can't be moved whether you click and drag it with the mouse or change the values in the X: and Y: fields in the Control panel or Transform panel. Not only can you *not* move a locked object, but you can't delete it, either. However, you can change other attributes of a locked object, including its stroke and fill.

To unlock a selected object, choose Object➪Unlock Position or press Option+⌘+L or Ctrl+Alt+L.

You can also lock entire layers, as described in Chapter 5.

Working with Object Styles

I suspect that object styles are underappreciated and underused, rarely used in real-world documents. That's a pity, because the use of styles for object formatting — not just text formatting — makes your work easier by automatically and reliably applying time-consuming settings to multiple objects and ensuring that your object formatting is both consistent and easily managed.

Creating object styles

You create object styles by using the Object Styles panel (Window➪Object Styles or ⌘+F7 or Ctrl+F7), shown in Figure 10-1. You can also click the New Object Style iconic button at the bottom of the panel.

Figure 10-1: The Object Styles panel and its flyout menu.

TIP
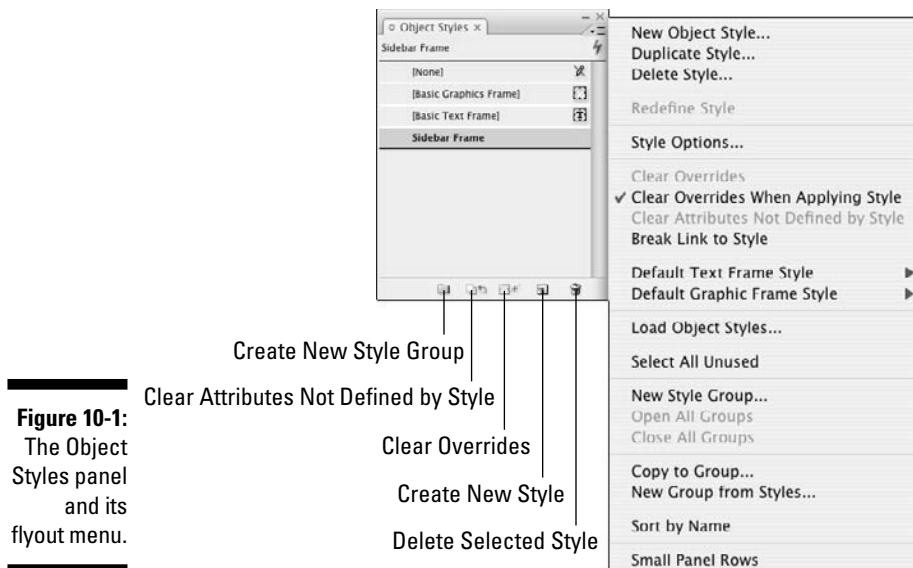
The simplest way to create an object style is to select an already-formatted object with any selection tool, then choose New Object Style from the Object Style panel's flyout menu. InDesign records all the settings automatically from the selected object, so they're in place for the new object style.

Whether you start with an existing object or create a new object style completely from scratch, you use the New Object Style menu option that opens the New Object Style dialog box shown in Figure 10-2.
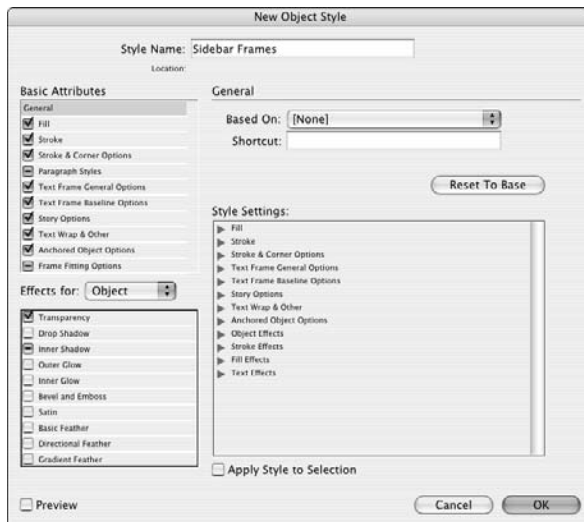
Figure 10-2:
The New Object Style dialog box and its General pane.

At the left side of the dialog box is a list of types of attributes that are or can be set. The checked items are in use for this style — you can uncheck an item so InDesign doesn't apply its settings to objects using the style. For example, if Fill is unchecked, the object style won't apply any Fill settings to objects using that style (and won't change any fill settings that have been applied to that object locally).

To switch from one type of attribute to another, simply click the item name for the type of attribute that you want to adjust, such as Stroke or Transparency.

TIP

Be sure to select the Preview option to see the results of object styles on the currently selected object. Of course, you need to make sure that the object is visible on-screen to see those effects.

When you open the New Object Style dialog box, you see the General pane, which lets you create a new style based on an existing object style (by using the Based On pop-up menu), and which lets you assign a keyboard shortcut for fast application of this style (by using the Shortcuts field).

You can use the Based On feature to create families of object styles. For example, you can create a style called _Photo-Standard_ for the bulk of your placed photographs, and then create variations such as _Photo-Sidebar_ and _Photo-Author._ The Photo-Standard style might specify a hairline black stroke around the photo, while Photo-Sidebar might change that to a white stroke. But if you later decide you want the stroke to be 1 point and change it in Photo-Standard, Photo-Sidebar automatically gets the 1-point stroke while retaining the white color.

The General pane also lets you see the current style settings. Click any of the arrows in the Style Settings section to get more details on how they are set for this object style.

The other panes in the New Object Styles dialog box provide the same capabilities that you find elsewhere in InDesign, brought into one convenient place so you can use them in styles. Because there are so many panes, the New Object Style dialog box now breaks them into two sections. The panes in the first section — Basic Attributes — are

- ✔ **The Fill pane** lets you set colors for fills using whatever colors are defined in the Swatches panel. You can also set the tint and, if you select a gradient fill, the angle for that gradient. Finally, you can choose to have the fill overprint the contents of the frame by selecting the Overprint Fill option.

- ✔ **The Stroke pane** is identical to the Fill pane except that options specific to fills are grayed out, and options available to strokes are made available. The color, tint, and gradient angle options are the same as for the Fill pane. You can also choose the type of stroke (solid line, dashed line, or dotted line) by using the Type pop-up menu, and adjust the thickness by filling in the Weight field. You can also choose to overprint the stroke over underlying content, plus determine — if your stroke is a dotted or dashed line — the color, tint, and overprint for the gap.

- ✔ **The Stroke & Corner Options pane** lets you set stroke position and how corners and line ends are handled. It also lets you apply fancy corners to frames. The Stroke Options section is where you align the strokes to the frame edges, determine how lines join at corners, and decide what line endings are applied. The Corner Options section is where you select from five fancy corners, such as Bevel and Rounded, by using the Effect pop-up menu, and where you specify the radius, or reach, of the corner by using the Size field. (See Chapter 8 for the low-down on strokes and Chapter 9 for the skinny on corner options.)

- ✔ **The Paragraph Styles pane** controls what paragraph style, if any, is applied to text in the frame. Chances are you won't use this setting except for frames that contain only consistent, very simple text, such as pull-quotes or bios. (See Chapter 13 for details.)

- ✔ **The Text Frame General Options pane** controls how text is handled within a frame. This essentially replicates the controls in the General pane of the Text Box Options dialog box (Object⇨Text Frame Options or

⌘+B or Ctrl+B), including number of columns, column width, gutter settings, inset spacing (how far from the frame edge text is placed), vertical justification (how text is aligned vertically in the frame), and whether text wrap settings are ignored when this frame overlaps other frames. (See Chapter 12 for details.)

✔ **The Text Frame Baseline Options pane** controls how text is handled within a frame. This essentially replicates the controls in the Baseline Options pane of the Text Box Options dialog box (Object⇨Text Frame Options or ⌘+B or Ctrl+B), including how the text baseline is calculated for the frame and whether the text frame gets its own baseline grid. (See Chapter 11 for details.)

✔ **The Story Options pane** enables optical margin alignment — its controls are the same as in the Story panel (Type⇨Story), detailed in Chapter 17. Optical margin alignment adjusts the placement of text along the left side of a frame so the text alignment is more visually pleasing.

✔ **The Text Wrap & Other pane** lets you set text wrap, mirroring the features of the Text Wrap panel (Window⇨Text Wrap or Option+⌘+W or Ctrl+Alt+W, explained in Chapter 17), as well as make an object nonprinting (normally handled through the Attributes panel by choosing Window⇨Attributes).

✔ **The Anchored Object Options pane** lets you set the attributes for inline and anchored frames, mirroring the controls in the Anchored Object Options dialog box (Object⇨Anchored Object⇨Options), which I explain in Chapter 11.

The second set of panes all relate to the features found in the Effects dialog box and panel, as covered in Chapter 9: Transparency, Drop Shadow, Inner Shadow, Outer Glow, Inner Glow, Bevel and Emboss, Satin, Basic Feather, Directional Feather, and Gradient Feather.

Managing object styles

The Object Styles panel's flyout menu (refer to Figure 10-1) has several options for managing object styles:

✔ **Duplicate Style:** Click an object style's name and then choose this menu option to create an exact copy. If you want to create an object style that's similar to one you already created, you might want to choose New Object Style rather than Duplicate Style, and then use the Based On option to create a child of the original. If you choose Duplicate Style, the copy is identical to, but not based on, the original; if you modify the original, the copy is not affected.

✔ **Delete Style:** Choose this to delete selected object styles. To select multiple styles, press and hold ⌘ or Ctrl as you click their names. To select a range of styles, click the first one, and then press and hold Shift and

click the last one. You can also delete styles by selecting them in the pane and then clicking the Delete Selected Styles iconic button (the trashcan icon) at the bottom of the panel.

✔ **Redefine Style:** To modify an existing object style, first make changes to an object that already has an object style defined for it, and then select Redefine Style. The newly applied formats are applied to the object style.

✔ **Style Options:** This option lets you modify an existing object style. When a style is highlighted in the Object Styles panel, choosing Style Options displays the Object Style Options dialog box, which is identical to the New Object Style dialog box covered earlier.

✔ **Load Object Styles:** Choose this option if you want to import object styles from another InDesign document. After selecting the document from which to import the styles, you will get a dialog box listing the styles in the chosen document, so you can decide which ones to import. Note the Incoming Style Definitions window at the bottom of the dialog box; it lists the style definitions to help you decide which to import, as well as which to overwrite or rename.

✔ **Select All Unused:** Select this option to highlight the names of all object styles that have not been applied to any objects in the current document. This is a handy way of identifying unused styles in preparation for deleting them (by choosing the Delete Style menu option).

✔ **Sort by Name:** This option alphabetizes your object styles for easier access. (InDesign adds styles to the Object Styles panel in the order in which they were created.)

✔ **Small Panel Rows:** Select this option to reduce the text size in the Object Styles panel. Although harder to read, a panel with this option selected lets you access more styles without having to scroll. To return the panel to its normal text size, deselect this option.

TIP

InDesign comes with three predefined object styles — [Normal Text Frame], [Normal Graphics Frame], and [Normal Grid] — that you can modify as desired.

Applying object styles

After you create an object style, applying it is easy. Just click an object and then click the object style name in the Object Styles panel or press its keyboard shortcut. (Windows users must make sure Num Lock is on when using shortcuts for styles.)

TIP

You can set which object styles are automatically used for new text and graphics frames: In the Object Styles panel's flyout menu, choose Default Text Frame Style and select the desired style from the submenu to set a default text frame; choose Default Graphic Frame Style and select the desired style

from the submenu to set a default graphics frame. To no longer have object styles automatically applied to new objects, choose [None] in the Default Text Frame and/or Default Graphic Frame submenus.

How existing formatting is handled

When you apply an object style to selected objects, all local formats are retained. All other formats are replaced by those of the applied style — that is, unless you do one of the following:

✔ If you press and hold Option or Alt when clicking a name in the Object Styles panel, any local formatting that has been applied to the objects is removed. You can achieve the same effect by choosing Clear Attributes Not Defined by Style from the Object Styles panel's flyout menu or by clicking the Clear Attributes Not Defined by Style iconic button at the bottom of the Object Styles panel.

✔ If you want to override any local changes with the settings in the object style, choose Clear Overrides in the flyout menu or click the Clear Overrides iconic button at the bottom of the Object Styles panel. The difference is that Clear Attributes Not Defined by Style removes all attributes for which the object style contains no settings, whereas Clear Overrides imposes the object style's settings over conflicting attributes that you set manually.

✔ To have InDesign CS3 automatically override local changes when applying a style, be sure the new Clear Overrides When Applying Style flyout menu option is checked. Choosing the item toggles between selecting (checking) and deselecting (unchecking) this option.

If a plus sign (+) appears to the right of an object style's name, it means that the object has local formats that differ from those of the applied object style. This can occur if you apply an object style to object text to which you've done some manual formatting, or if you modify formatting for an object after applying an object style to it. (For example, you may have changed the fill color; that is a local change to the object style and causes the + to appear.)

Removing an object style from an object

To remove a style from an object, choose Break Link to Style from the Object Styles panel's flyout menu. The object's current formatting won't be affected, but it will no longer be updated when the object style is changed.

Managing object styles

InDesign also lets you manage your styles, such as creating groups of styles to make it easier to find relevant ones, and bring in styles from other documents. Because these features work the same for paragraph, character, table, and cell styles as well, I've covered these features in one place: Chapter 14.

Managing Links

The Links panel (Window➪Links, or Shift+⌘+D or Ctrl+Shift+D) is a handy place to manage the links to your graphics and text, particularly when you need to update them. (Figure 10-3 shows the Links panel.)

REMEMBER

InDesign always creates links for graphics files. But it will create links to source text files (including spreadsheets) only if the Create Links When Placing Text and Spreadsheet Files option is checked in the Type pane of the Preferences dialog box (InDesign➪Preferences➪Type or ⌘+K on the Mac, or Edit➪Preferences-Type or Ctrl+K in Windows). This option is *not* checked by default because many designers don't want to have text files be easily updated in their layouts. That's because all the formatting they have done to the file in InDesign is removed when the link to the source file is updated, causing the text to be replaced.

The first five commands in the Links panel's flyout menu let you reestablish links to missing and modified files, display an imported graphic or text file in the document window, open the program used to create a graphic or text file, and work on copies and versions of the source graphics and text:
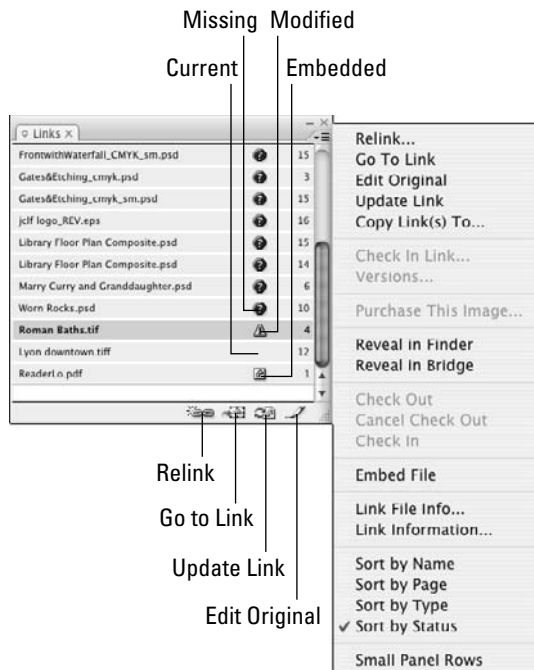

Figure 10-3:
The Links panel and its flyout menu.

✔ **Relink:** This command, and the Relink iconic button (the leftmost at the bottom of the panel), lets you reestablish a missing link or replace the original file you imported with a different file. When you choose Relink or click the button, the Relink dialog box is displayed and shows the original pathname and filename. You can enter a new pathname and filename in the Location field, but it's easier to click Browse, which opens a standard Open a File dialog box. Use the controls to locate and select the original file or a different file, and then click OK. (You can also drag and drop a file icon from the Mac OS Finder or Windows Explorer directly into the Relink dialog box.) If you want to restore broken links to multiple files simultaneously, highlight their filenames in the scroll list, and then choose Relink or click the Update Link button.

InDesign CS3 now lets you relink all instances of a file in your layout, so you only have to do the operation once. Here's the trick: In the Relink dialog box, be sure to check the new Relink All Instances option.

✔ **Go to Link:** Choose this option, or click the Go to Link iconic button (second from left) in the panel to display the highlighted file in the document window. InDesign will, if necessary, navigate to the correct page and center the frame in the document window. You can also display a particular graphic or text file by double-clicking its name in the scroll list while holding down the Option or Alt key.

✔ **Edit Original:** If you want to modify an imported graphic or text file, choose Edit Original from the flyout menu or click the Edit Original button (far right) at the bottom of the panel. InDesign will try to locate and open the program used to create the file. This may or may not be possible, depending on the original program, the file format, and the programs available on your computer.

✔ **Update Link:** Choose this option or click the Update Link iconic button (third from the left) at the bottom of the panel to update the link to a modified graphic or text file. Highlight multiple filenames, and then choose Update Link or click the Update Link button to update all links at once.

When you update missing and modified graphics, any transformations — rotation, shear, scale, and so on — that you've applied to the graphics or their frames are maintained, unless you've deselected the new Relink Preserves Dimensions option in the File Handling pane of the Preferences dialog box (InDesign⇨Preferences⇨File Handling or ⌘+K on the Mac, or Edit⇨Preferences⇨File Handling or Ctrl+K in Windows).

✔ **Copy Link To:** Choose this option to copy the source graphic or text file to a new location and update the link so that it refers to this new copy.

Other useful flyout menu options include

✔ **Reveal in Finder (Macintosh) and Reveal in Explorer (Windows):** This menu option opens a window displaying the contents of the folder that contains the source file, so you can perhaps move, copy, or rename it. (The Reveal in Bridge option is a similar feature for the expert Adobe Bridge companion program not covered in this book.)

✔ **Embed File (for graphics only):** This option lets you embed the complete file of any imported graphics file. (InDesign normally imports only a low-resolution screen preview when you place a graphic that is 48K or larger.) If you want to ensure that the graphics file will forever remain with a document, you can choose to embed it — however, by embedding graphics, you'll be producing larger document files, which means it will take you longer to open and save them. If you do use this option, an alert is displayed and informs you about the increased document size that will result. Click Yes to embed the file. Note that this menu option changes to Unembed File, so you can re-enable the original link at any time.

✔ **Unlink (for text files only):** This option removes the link to the source text file, so it can't be updated. Note that this option cannot be undone from the Links panel; you have choose Edit⇨Undo, or press ⌘+Z or Ctrl+Z.

✔ **Link Information:** This option displays the Link Information dialog box, which actually doesn't let you do much. (The Previous and Next buttons let you display information about the previous and next files in the list, but that's about it.) But it does display 11 sometimes-useful bits of information about the highlighted file, including its name, status, creation date, file type, and location.

✔ **Sort by Name:** This option lists all files in alphabetical order.

✔ **Sort by Page:** This option lists imported files on page 1 first, followed by imported files on page 2, and so on.

✔ **Sort by Type:** This option lists all files grouped by type of file (such as Word, JPEG, and TIFF).

✔ **Sort by Status:** This option lists files with missing links first, followed by files that have been modified, and finally files whose status is okay.

✔ **Small Panel Rows:** This option lets you reduce the size of text in the panel and decrease the space between entries so that you can see more entries at once. Of course, the reduced rows are also harder to read. To go back to the normal display size, simply select this option again.

The other options in the flyout menu — Save Link Version, Versions, Purchase This Image, Check Out, Cancel Check Out, Check In, and Link File Info — are expert features not covered in this book.

Chapter 11

Aligning and Arranging Objects

*W*hen you draw objects like frames or lines, they appear where you draw them. That's what you expect, right? But sometimes you want them to appear where you meant to draw them, not where you actually did. Working with the mouse is inexact, but you can overcome that.

This chapter shows you how to use a variety of InDesign features to precisely control the placement of objects, including the ability to enter actual coordinates for objects, to use grids and guidelines features to ensure that your objects and text line up where you want them to, and to use the Align panel and related commands to make sure objects line up relative to each other, so your layouts are all neat and tidy.

The other part of keeping your layouts neat and tidy is managing the arrangements of objects. In addition to the grouping and locking functions covered in Chapter 10, InDesign also lets you control the stacking order of objects that overlap and tie objects to spots in text so they stay close to the text that references them.

Precise Positioning with Coordinates

The most precise way to position objects is by entering the object's desired coordinates in the X: and Y: fields of the Control panel or the Transform panel. (You can also precisely change the object's size by entering values in the W: and H: fields.) The Control panel is visible by default at the top of the document window. If it's not visible, open the Control panel by choosing Window➪Control or by pressing Option+⌘+6 or Ctrl+Alt+6.

The Control panel is more powerful than the Transform panel, which is a holdover from older versions of InDesign, but if you want to use the Transform panel, choose Window➪Object & Layout➪Transform. Figure 11-1 shows both the Control panel and Transform panel, their flyout menus, and a selected frame.

Everyone should use the Control panel's coordinates to make sure that objects are consistently placed from page to page. Many designers place objects by eye, using the mouse, but that typically means there are small position and size variations from page to page that shouldn't be there. Many readers won't notice if the differences are slight, but even small differences make small adjustments to text flow that can add up over pages. And it's all so unnecessary.

You usually want to enter coordinates based on the upper-left corner, so be sure that the upper-left reference point is made into the control point (just click it if it is not). How do you know which reference point is the current control point? The control point is black, while the other reference points are white. (Chapter 1 provides the deeper details.)

Figure 11-1:
The Control panel (top) and Transform panel let you enter precise coordinates for an object's position.
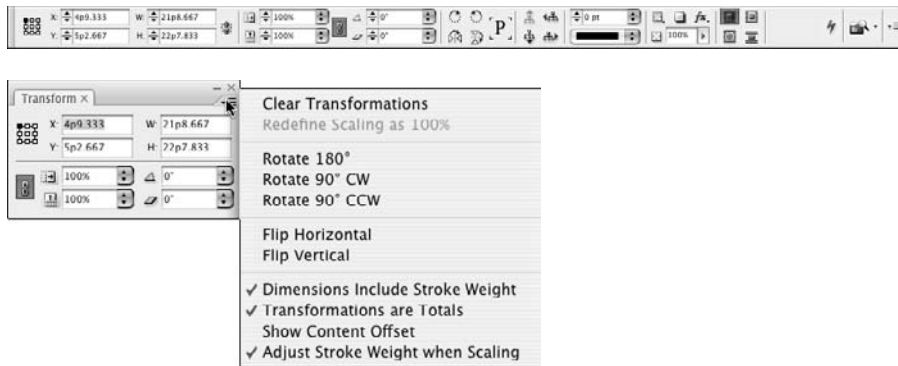
Lining Up Objects with Guidelines and Grids

If you've ever seen a carpenter use a chalked string to snap a temporary line as an aid for aligning objects, you understand the concept behind ruler guidelines and grids. They're not structurally necessary and they don't appear in the final product, yet they still make your work easier.

InDesign provides several types of grids and guidelines:

✔ **Ruler guides** are moveable guidelines that are helpful for placing objects precisely and for aligning multiple items.

✔ **Margin and column guides** are part of your page setup when you create or modify a document (see Chapter 3), providing the default margin around the sides of the page and the space between the default text frame's columns.

✔ A **baseline grid** is a series of horizontal lines that help in aligning lines of text and objects across a multicolumn page. When a document is open and it has a baseline grid showing, the page looks like a sheet of lined paper.

✔ A **document grid** is a set of horizontal and vertical lines that help you place and align objects.

✔ A **frame-based grid** is similar to a baseline grid except that it is just for a specific text frame.

You won't need all the grids and guidelines at once. You'll most likely use a combination of guides and grids, but using all four at once is more complicated than necessary.

Using ruler guides

InDesign lets you create individual ruler guides manually. You can also set ruler guides automatically with the Create Guides command (Layout⇨Create Guides).

Manually creating ruler guides

To create ruler guides on an as-needed basis, follow these steps:

1. **Go to the page or spread onto which you want to place ruler guides.**

2. **If the rulers are not displayed at the top and left of the document window, choose View⇨Show Rulers or press ⌘+R or Ctrl+R.**

3. **Drag the pointer (and a guideline along with it) from the horizontal ruler or vertical ruler onto a page or the pasteboard.**

4. **When the guideline is positioned where you want it, release the mouse button.**

   If you release the mouse when the pointer is over a page, the ruler guide extends from one edge of the page to the other (but not across a spread). If you release the mouse button when the pointer is over the pasteboard, the ruler guide extends across both pages of a spread and the pasteboard. If you want a guide to extend across a spread and the pasteboard, you can also hold down the ⌘ or Ctrl key as you drag and release the mouse when the pointer is over a page.

TIP

Place both a horizontal and vertical guide at the same time by pressing ⌘ or Ctrl and dragging the *ruler intersection point* (where the two rulers meet) onto a page. You can also place a guide that extends across the page or spread and pasteboard by double-clicking the vertical or horizontal ruler.

Ruler guides are cyan in color (unless you change the color by choosing Layout⇨Ruler Guides) and are associated with the layer onto which they're placed. You can show and hide ruler guides by showing and hiding the layers that contain them. You can even create layers that contain nothing but ruler guides and then show and hide them as you wish. (See Chapter 5 for more information about layers.)

TIP

To create ruler guides for several document pages, create a master page, add the ruler guides to the master page, and then apply the master to the appropriate document pages.

Automatically creating ruler guides

Here's how to create a set of ruler guides automatically:

1. **If the documents contain multiple layers, display the Layers panel (Window⇨Layers or F7) and click the name of the layer to which you want to add guides.**

2. **Choose Layout⇨Create Guides to display the Create Guides dialog box, shown in Figure 11-2. (To see the guides on the page while you create them, check Preview.)**

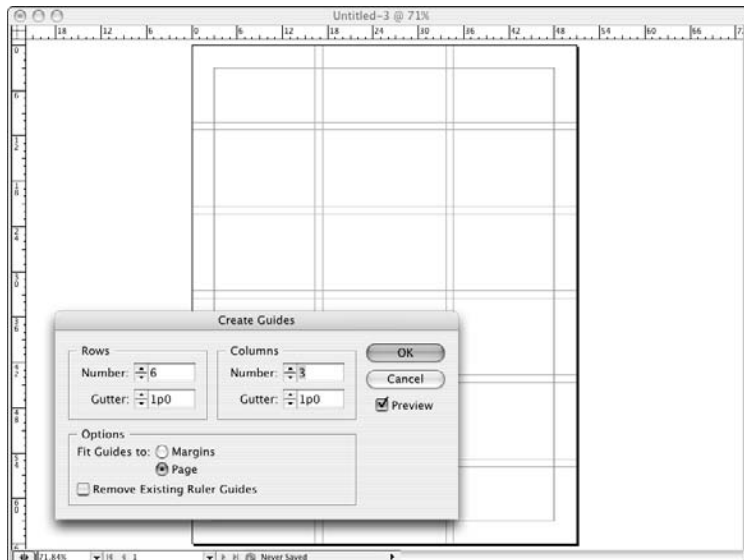**Figure 11-2:**
The Create Guides dialog box and the guides it created.

3. **In the Rows and Columns areas, specify the number of guides you want to add in the Number fields and, optionally, specify a Gutter width between horizontal (Rows) and vertical (Columns) guides. Enter** 0 **(zero) in the Gutter fields if you don't want gutters between guides.**

4. **In the Options area, click Margins to fit the guides in the margin boundaries; click Page to fit the guides within the page boundary.**

5. **Remove any previously placed ruler guides by checking Remove Existing Ruler Guides.**

6. **When you finish specifying the attributes of the ruler guides, click OK to close the dialog box.**
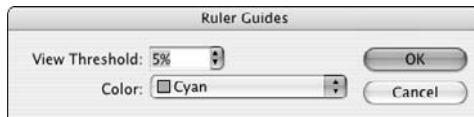
Working with ruler guides

You can show and hide, lock and unlock, select and move, copy and paste, and delete ruler guides. Here are a few pointers for working with ruler guides:

- ✔ **Display or hide ruler guides** by choosing View⇨Grids & Guides⇨Show/ Hide Guides or by pressing ⌘+; (semicolon) or Ctrl+; (semicolon).

- ✔ **Lock or unlock all ruler guides** by choosing View⇨Grids & Guides⇨Lock Guides or by pressing Option+⌘+; (semicolon) or Ctrl+Alt+; (semicolon). Ruler guides are locked when Lock Guides is checked.

- ✔ **Select a ruler guide** by clicking it with a selection tool. To select multiple guides, hold down the Shift key and click them. The color of a guide changes from cyan to the color of its layer when it is selected. To select all ruler guides on a page or spread, press Option+⌘+G or Ctrl+Alt+G.

- ✔ **Move a guide** by clicking and dragging it as you would any object. To move multiple guides, select them and then drag them. To move guides to another page, select them, choose Edit⇨Cut or press ⌘+X or Ctrl+X (or choose Edit⇨Copy or press ⌘+C or Ctrl+C), display the target page, and then choose Edit⇨Paste or press ⌘+V or Ctrl+V. If the target page has the same dimensions as the source page, the guides are placed in their original positions.

- ✔ **Delete ruler guides** by selecting them and then pressing Delete or Backspace.

- ✔ **Change the color of the ruler guides and the view percentage above which they're displayed** by choosing Layout⇨Ruler Guides. The Ruler Guides dialog box, shown in Figure 11-3, appears. Modify the View Threshold value, choose a different color from the Color pop-up menu, and then click OK. If you change the settings in the Ruler Guides dialog box when no documents are open, the new settings become defaults and are applied to all subsequently created documents.

- ✔ **Display ruler guides behind — instead of in front of — objects** by choosing InDesign⇨Preferences⇨Guides & Pasteboard or pressing ⌘+K on the Mac, or by choosing Edit⇨Preferences⇨Guides & Pasteboard or

by pressing Ctrl+K in Windows. Then select the Guides in Back option in the Guide Options section of the dialog box.

✔ **Make object edges snap (align) to ruler guides when you drag them into the snap zone** by selecting the Snap to Guides option (View⇨Grids & Guides⇨Snap to Guides, or press Shift+⌘+; [semicolon] or Ctrl+Shift+; [semicolon]). To specify the snap zone (the distance — in pixels — at which an object will snap to a guide), choose InDesign⇨Preferences⇨ Guides & Pasteboard or press ⌘+K on the Mac, or choose Edit⇨ Preferences⇨Guides & Pasteboard or press Ctrl+K in Windows, and enter a value in the Snap to Zone field in the Guide Options section of the dialog box.

Figure 11-3:
The Ruler
Guides
dialog box.

Working with column guides

You can also adjust column guides if your document has them, though you don't get the same flexibility in adjusting column guides as you do ruler guides. Column guides are created when you create a new document and set it up as having multiple columns (see Chapter 3).

By default, column guides are locked. To unlock them (or relock them) choose View⇨Grids & Guides⇨Lock Column Guides. (If the menu option has a check mark to its left, the column guides are locked.)

To move a column guide, click and drag it. Note that the color of a selected column guide does not change as the color of a selected ruler guide does. Also note that you cannot select multiple column guides or move them to other pages. The only way to add or delete column guides is to change the number of guides in the Margins and Columns dialog box (choose Layout⇨Margins and Columns); adjusting the number of columns undoes any custom moves applied to column guides.

Using document grids

A document grid is like the grid paper you used in school, a visual crutch to help ensure that the objects you draw and reposition are placed at desired increments. Using a grid can help ensure that objects align and are sized consistently.

If you plan to use a grid, set it up before you start working in the document. Because documents tend to have different grid settings based on individual contents, you probably want to set Grids preferences with a specific document open so that the grid will apply only to that document. The Grids pane of the Preferences dialog box (InDesign⇨Preferences⇨Grids or ⌘+K on the Mac, or Edit⇨Preferences⇨Grids or Ctrl+K in Windows) is shown in Figure 11-4.
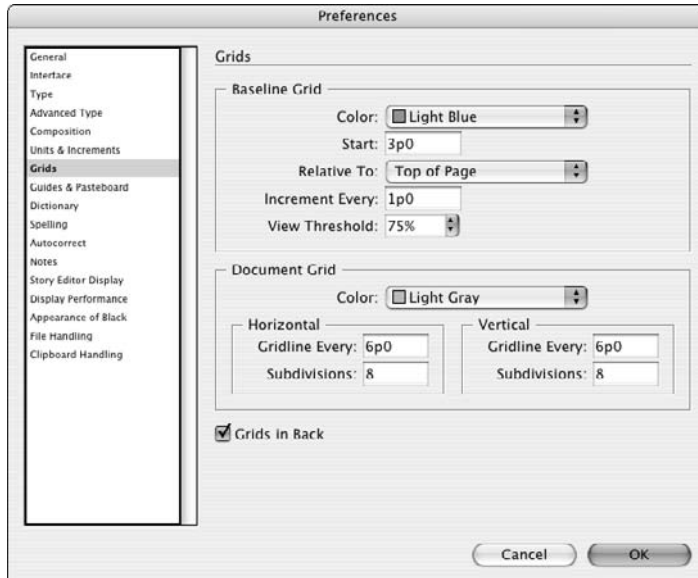
Figure 11-4: The Grids pane of the Preferences dialog box.

You have the following options:

- ✔ **Color:** The default color of the document grid is Light Gray. You can choose a different color from the Color pop-up menu or choose Other to create your own.

- ✔ **Gridline Every:** The major gridlines, which are slightly darker, are positioned according to this value. The default value is 6p0; in general, you want to specify a value within the measurement system you're using. For example, if you work in inches, you might enter **1 inch** in the Gridline Every field. You set the horizontal and vertical settings separately.

- ✔ **Subdivisions:** The major gridlines established in the Gridline Every field are subdivided according to the value you enter here. For example, if you enter **1 inch** in the Gridline Every field and **4** in the Subdivisions field, you get a gridline at each quarter-inch. The default number of subdivisions is 8. You set the horizontal and vertical settings separately.

By default, the document grid appears on every spread behind all objects. You can have grids display in front by deselecting the Grids in Back check box.

To make object edges snap (align) to the grid when you drag them into the snap zone, select the Snap to Document Grid option (View⇨Grids & Guides⇨ Snap to Document Grid, or press Shift+⌘+' [apostrophe] or Ctrl+Shift+' [apostrophe]). To specify the snap zone (the distance — in pixels — at which an object will snap to a gridline), InDesign will use whatever settings you specified for guidelines, as explained earlier in this chapter.

To display the document grid, choose View⇨Grids & Guides⇨Show Document Grid or press ⌘+' (apostrophe) or Ctrl+' (apostrophe).

Using baseline grids

You may not already know this, but each and every new document you create includes a baseline grid. A baseline grid can be helpful for aligning text baselines across columns and for ensuring that object edges align with text baselines.

But chances are that the default settings for the baseline grid won't match the baselines (leading) for the majority of your text. The default baseline grid begins ½ inch from the top of a document page; the default gridlines are light blue, are spaced 1 pica apart, and appear at view percentages above 75 percent. If you change any of these settings when no documents are open, the changes are applied to all subsequently created documents; if a document is open, changes apply only to that document.

So here's how to modify the baseline grid:

1. **Choose InDesign⇨Preferences⇨Grids or press ⌘+K on the Mac, or choose Edit⇨Preferences⇨Grids or press Ctrl+K in Windows.**

   The Grids pane, shown in Figure 11-4, appears. (If you used the shortcuts, then select the Grids pane from the list at left.)

2. **Pick a color for the baseline from the Color pop-up menu in the Baseline Grid area.**

3. **In the Start field, enter the distance between the top of the page and the first gridline.**

   If you enter **0**, the Increment Every value determines the distance between the top of the page and the first gridline.

4. **In the Increment Every field, enter the distance between gridlines.**

   If you're not sure what value to use, enter the leading value for the publication's body text.

5. **Choose a View Threshold percentage from the pop-up menu or enter a value in the field.**

   You probably don't want to display the baseline grid at reduced view percentages because gridlines become tightly spaced.

6. **Click OK to close the dialog box and return to the document.**

> **TIP**
>
> The Show/Hide Baseline Grid command (View⇨Grids & Guides⇨Show/Hide Baseline Grid, or Option+⌘+' [apostrophe] or Ctrl+Alt+' [apostrophe]) lets you display and hide a document's baseline grid.

When you set a baseline grid, it applies to the entire document. Gridlines are displayed behind all objects, layers, and ruler guides. To get text to line up to the baseline grid, you need to ensure that the Align to Grid pop-up menu is set to either First Line Only or All Lines in your paragraph style or that the Align to Baseline Grid check box is selected in the Paragraph panel or Control panel. Chapter 13 covers such paragraph formatting in detail.

A document-wide baseline grid is all fine and dandy, but often it's not enough. The document-wide baseline grid is basically useful for your body text and often your headline text, assuming that the baseline grid's increments match the leading for that text. But what if you have other elements, like sidebars, that have different leading?

The answer is to use text frame–specific baseline grids. You set the grid as part of text frame options by choosing Object⇨Text Frame Options or by pressing ⌘+B or Ctrl+B and then going to the Baseline Options pane. Its options are almost identical to those in the Grids pane of the Preferences dialog box. A baseline grid established for a text frame affects only the text in that frame.

Aligning Objects to Each Other

InDesign lets you align and distribute objects, saving you the hassle of manually moving and placing each element, or figuring out the correct locations in the Control panel or Transform panel to do so. The Align panel is where InDesign offers these timesaving abilities.

The Align panel (Window⇨Object & Layout⇨Align or Shift+F7), shown in Figure 11-5, has several iconic buttons that let you manipulate the relative position of multiple objects in two ways. (The buttons show the alignments they provide.) You can

> ✔ **Line up objects along a horizontal or vertical axis.** For example, if you've randomly placed several small graphic frames onto a page, you can use the alignment buttons in the Align panel to align them neatly — either horizontally or vertically.

> ✓ **Distribute space evenly among objects along a horizontal or vertical axis.** Here's a typical problem that's easily solved by using this feature: You've carefully placed five small pictures on a page so that the top edges are aligned across the page and there is equal space between each picture. Then you find out one of the pictures needs to be cut. After deleting the unneeded picture, you could use the Align panel to redistribute the space among the remaining pictures so that they're again equally spaced.

REMEMBER

The Align buttons don't work with objects that have been locked with the Lock Position command (Object➪Lock Position, or ⌘+L or Ctrl+L). If you need to align a locked object, you must first unlock it (Object➪Unlock Position, or Option+⌘+L or Ctrl+Alt+L). If the objects are on a locked layer, you need to unlock the layer.

When you click an iconic button in the Align panel, selected objects are repositioned in the most logical manner. For example, if you click the Horizontal Align Left button, the selected objects are moved horizontally (to the left, in this case) so that the left edge of each object is aligned with the left edge of the leftmost object. Along the same lines, if you click the Vertical Distribute Center button, the selected objects are moved vertically so that there's an equal amount of space between the vertical center of each object.

Spacing can appear uneven if you click the Horizontal or Vertical Distribute buttons when objects of various sizes are selected. For objects of different sizes, you'll usually want to use the Distribute Spacing buttons (which make the space between objects even) rather than space objects based on their centers or sides (which is how the Distribute Object buttons work).

REMEMBER

If the two Distribute Spacing icons do not appear at the bottom of the panel and you want to distribute objects, choose Show Options from the flyout menu.

Figure 11-5:
The Align panel contains 14 iconic buttons that let you control the alignment and space among selected objects.
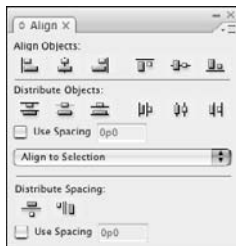
Stacking Objects

As I mentioned at the beginning of this chapter, arranging your objects is as key to having neat and tidy layouts as using grids and so forth to align objects.

Each time you begin work on a new page, you start with a clean slate (unless the page is based on a master page, in which case the master objects act as the page's background; see Chapter 6 for more on master pages). Every time you add an object to a page — either by using any of InDesign's object-creation tools or with the Place command (File⇨Place or ⌘+D or Ctrl+D) — the new object occupies a unique place in the page's object hierarchy, or *stacking order*.

The first object you place on a page is automatically positioned at the bottom of the stacking order; the next object is positioned one level higher than the first object (that is, in front of the backmost object); the next object is stacked one level higher; and so on for every object you add to the page. (It's not uncommon for a page to have several dozen or even several hundred stacks.)

Although each object occupies its own stack level, if the objects on a page don't overlap, the stacking order is not an issue. But some of the most interesting graphic effects you can achieve with InDesign involve arranging several overlapping objects, so it's important to be aware of the three-dimensional nature of a page's stacking order.

You may change your mind about what you want to achieve in your layout after you've already placed objects in it. To change an object's position in a page's stacking order, use the Arrange command (Object⇨Arrange), which offers four choices:

- ✔ **Bring to Front** (Shift+⌘+] or Ctrl+Shift+])
- ✔ **Bring Forward** (⌘+] or Ctrl+])
- ✔ **Send Backward** (⌘+[or Ctrl+[)
- ✔ **Send to Back** (Shift+⌘+[or Ctrl+Shift+[)

To select an object that's hidden behind one or more other objects, press and hold ⌘ or Ctrl and then click anywhere within the area of the hidden object. The first click selects the topmost object; each successive click selects the next lowest object in the stacking order. When the bottom object is selected, the next click selects the top object. If you don't know where a hidden object is, you can simply click the object or objects in front of it, then send the object(s) to the back. (See Chapter 9 for more on selecting stacked objects.)

Creating Inline and Anchored Frames

In most cases, you want the frames you place on your pages to remain precisely where you put them. But sometimes, you want to place frames relative to related text in such a way that the frames move when the text is edited.

The simplest way is to use inline graphics. For example, if you're creating a product catalog that's essentially a continuous list of product descriptions and you want to include a graphic with each description, you can paste graphics within the text to create inline graphics frames.

A close cousin to the inline frame is the anchored frame, in which a frame follows a point in the text, but that frame is not actually in the text. For example, you might have a "For More Information" sidebar that you want to appear to the left of the text that first mentions a term. By using an anchored frame, you can have that sidebar move with the text so it always appears to its left, perhaps in an adjacent column or in the page margins.

Figure 11-6 shows examples of both an inline frame and an anchored frame.

Note that the process of creating inline and anchored frames — especially anchored frames — can appear overwhelming. It does require thinking through the frame's placement and visualizing that placement so you pick the right options in the various dialog boxes. But relax: You can experiment until you get the hang of it. That's why InDesign lets you undo your work.
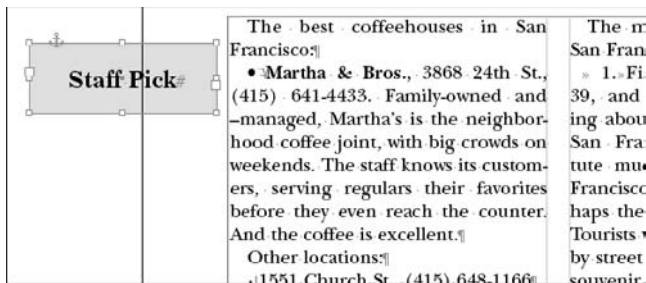

Figure 11-6: An inline frame (at top) and an anchored frame (the "Staff Pick" box is anchored to the word "Martha").

Working with inline frames

An inline frame is treated like a single character. If you insert or delete text that precedes an inline frame, the frame moves forward or backward along with the rest of the text that follows the inserted or deleted text. Although inline frames usually contain graphics, they can just as easily contain text or nothing at all.

WARNING!

Inline frames may interfere with line spacing in paragraphs that have automatic leading. If the inline frame is larger than the point size in use, the automatic leading value for that line is calculated from the inline frame. This leads to inconsistent line spacing in the paragraph. To work around this, you can apply a fixed amount of leading to all characters in the paragraph, adjust the size of inline frames, place inline frames at the beginning of a paragraph, or place inline frames in their own paragraphs.

There are three ways to create inline frames: pasting the frame into text, placing the frame into text, and using the new Anchored Object menu option. The first two are the simplest, but the third gives you more control over the inline frame when you create it. The third way also lets you create anchored frames, which are covered later in this chapter.

Using the Paste command

If you want to create an inline frame from an object you already created, all you have to do is copy or cut the object and then paste it into text as you would a piece of highlighted text. Here's how:

1. **Use the Selection tool to select the object you want to paste within text.**

   Any type of object can be used: a line, an empty shape, a text or picture frame, even a group of objects.

2. **Choose Edit➪Copy or press ⌘+C or Ctrl+C.**

   If you don't need the original item, you can use the Cut command (Edit➪ Cut or ⌘+X or Ctrl+X) instead of the Copy command.

3. **Select the Type tool and then click within the text where you want to place the copied object.**

   Make sure the cursor is flashing where you intend to place the inline frame.

4. **Choose Edit➪Paste or press ⌘+V or Ctrl+V.**

TIP

Inline frames often work best when placed at the beginning of a paragraph. If you place an inline frame within text to which automatic leading has been applied, the resulting line spacing can be inconsistent. To fix this problem, you can resize the inline frame.

Using the Place command

You can also use the Place command to create an inline graphics frame from an external picture file. (You can't use this technique for inline text frames.) Here's how:

1. **Select the Type tool and then click within a text frame to establish the insertion point.**

2. **Choose File⇨Place or press ⌘+D or Ctrl+D.**

3. **Locate and select the graphics file you want to place within the text; choose Open.**

TIP

To delete an inline frame, you can select it and then choose Edit⇨Clear or Edit⇨Cut, or you can position the text cursor next to it and press Delete or Backspace.

Adjusting inline frames

After you create an inline frame, you can adjust its position vertically or horizontally. Again, there are several methods.

Two quick-and-dirty methods to move an inline frame vertically are as follows:

✔ Use the Type tool to highlight the inline frame as you would highlight an individual text character. In the Character panel or Control panel, type a positive value in the Baseline Shift field to move the inline frame up; type a negative value to move the frame down.

✔ Use the Selection tool or Direct Selection tool to select the inline frame; drag the frame up or down.

A quick way to move an inline frame horizontally is to follow these steps:

1. **With the Type tool selected, click between the inline frame and the character that precedes it.**

2. **Use the kerning controls in the Character panel or Control panel to enlarge or reduce the space between the inline frame and the preceding character.**

You can more precisely control the position of inline frames by using the Anchored Object Options dialog box, covered in the next section.

REMEMBER

Of course, you can also adjust its other attributes as needed, such as strokes, fills, dimensions, rotation, and skew, by using the Tools panel, Control panel, and other panels.

Working with anchored frames

Anchored frames give you a whole new way of organizing objects. Essentially, they follow the relevant text within the parameters you specify, such as staying to the left of the text or staying at the top of the page that contains the text.

Note that an inline frame is a type of anchored frame, one where the frame stays within the text it is linked to. For simplicity, I'm using the term *anchored frame* to mean only those frames that are outside the text frame but remain linked to a specific point in the text.

In addition to preserving anchored framed in imported Microsoft Word files, InDesign lets you create anchors in your layout. To create anchored frames, do the following:

1. **Select the Type tool and then click within a text frame to establish the insertion point.**

2. **Choose Object⇨Anchored Object⇨Insert.**

   The Insert Anchored Object dialog box appears.

3. **In the Object Options section of the dialog box, specify the anchored frame's settings.**

   You can choose the type of content (text, graphics, or unassigned) with the Content pop-up menu, apply an object style by using the Object Style pop-up menu, apply a paragraph style via the Paragraph Style pop-up menu (if Content is set to Text), and set the anchored frame's dimensions in the Height and Width fields. Note that the paragraph style you choose, if any, applies to the anchored frame, not to the paragraph in which the anchored frame is linked.

4. **In the Position pop-up menu, choose what kind of frame you are creating: Inline or Above Line (both are inline frames) or Custom (an anchored frame).**

   The dialog box will show different options based on that choice, as Figure 11-7 shows.

   REMEMBER Anchored frames that you add by choosing Object⇨Anchored Object⇨ Insert do not have text automatically wrapped around them. Use the Text Wrap panel (Window⇨Text Wrap or Option+⌘+W or Ctrl+Alt+W) to open this panel and set text wrap. But anchored frames created by pasting a graphic into text *do* automatically have text wrap around them.

   TIP Selecting the Prevent Manual Positioning option ensures that the positions of individual anchored frames can't be adjusted by using InDesign's other text and frame controls (such as Baseline Shift). This forces users to use this dialog box to change the anchored frame's position, reducing the chances of accidental change.
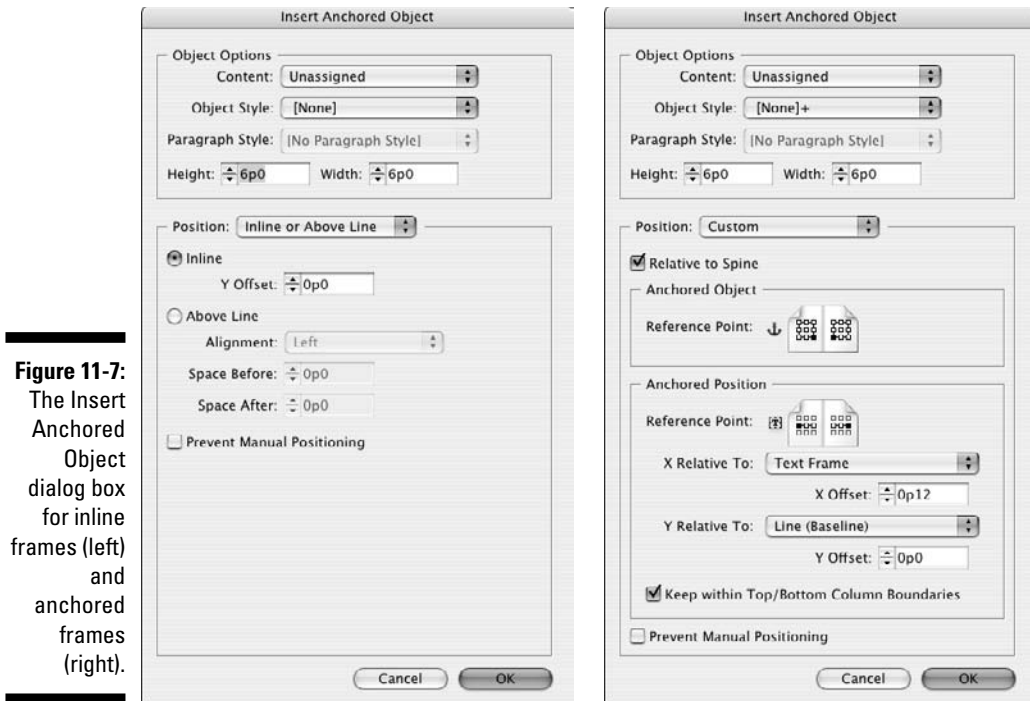
5. **Decide whether to select the Relative to Spine option.**

   If this option is *not* selected, the anchored frame is placed on the same side of the text frame on all pages, whether those pages are left-facing or right-facing. If the Relative to Spine option is selected, InDesign places the text frame on the outside of both pages or inside of both pages, depending on how the anchored position is set.

6. **In the Anchored Object section of the dialog box, click one of the positioning squares to set up the text frame's relative position.**

   Note that you need to think about both the horizontal and vertical position you desire. For example, if you want the anchored frame to appear to the right of the text reference, click one of the right-hand squares. (Remember that selecting the Relative to Spine option overrides this, making the right-hand pages' positions mirror that of the left-hand pages, rather than be identical to them.) If you choose the topmost right-hand square, the anchored frame is placed to the right of the text reference and vertically appears at or below that text reference. But if you choose the bottommost right-hand square, you're telling InDesign you want the anchored frame to appear vertically above the text reference. Experiment with your layout to see what works best in each case.

7. **In the Anchored Position section of the dialog box, click one of the positioning squares to set up the text reference's relative position.**

   Although there are nine squares shown, the only three that matter are those in the middle row. Typically, you place the text reference on the opposite side of the anchored frame — if you want the anchored frame to be to the left, you would indicate that the text reference is to the right. (If you set the text reference on the same side as the anchored frame, InDesign places the anchored frame over the text.) The reason there are three squares (left, middle, and right) is to accommodate layouts in which you want some anchored frames to appear to the left of the text and some to the right; in that case, choose the middle position here and select the right- or left-hand position in the Anchored Object section as appropriate to that object.

8. **There are three options in the Anchored Position section that give InDesign more precise instructions on how to place the anchored frames:**

   • **The X Relative To pop-up menu** tells InDesign from where the horizontal location is calculated, using the following options: Anchor Marker, Column Edge, Text Frame, Page Margin, and Page Edge. The right option depends both on where you want the anchored frames placed and whether you have multicolumn text boxes (in which case Text Frame and Column Edge result in different placement, while in a single-column text frame they do not). You can also specify a specific amount of space to place between the chosen X Relative To point and the anchored frame by typing a value in the X Offset field.

   • **The Y Relative To pop-up menu** tells InDesign from where the vertical location is calculated, using the following options: Line (Baseline), Line (Cap-height), Line (Top of Leading), Column Edge, Text Frame, Page Margin, and Page Edge. As you expect, you can also indicate a specific amount of space to place between the chosen Y Relative To point and the anchored frame by typing a value in the Y Offset field.

   • **The Keep Within Top/Bottom Column boundaries check box** does exactly what it says.

9. **Click OK to insert the anchored frame.**

You can create inline frames using the same basic process as above, choosing Inline or Above Line in Step 4. You'll get most of the same controls as for anchored objects, such as the frame size and type, but of course there are no controls for the relative position because an inline frame goes at the text-insertion point. But it's easier to use the techniques described in the previous section for creating inline frames: copying or placing a frame into text.

Anchoring caveats

There are several caveats to consider when creating anchored frames:

✔ Because an anchored frame follows its text as it flows throughout a document, you need to ensure that your layout retains clear paths for those anchored objects to follow. Otherwise, anchored frames could overlap other frames as they move.

✔ Anchored frames should generally be small items and/or used sparingly. The more items you have anchored to text, the greater the chance that they will interfere with each other's placement. Likewise, large items can be moved only so far within a page, so the benefit of keeping them close to their related text disappears.

✔ Items such as pull-quotes are obvious candidates for use as anchored frames. But in many layouts, you want the pull-quotes to stay in specific locations on the page for good visual appearance. The InDesign anchored-frame function can accommodate that need for specific positioning on a page, but you need to be careful as you add or delete text so that you do not end up with some pages that have no pull-quotes at all because there is so much text between the pull-quotes' anchor points. Conversely, you need to make sure you don't have too many pull-quotes anchored close to each other, which could result in overlapping.

Typically, you use anchored frames for small graphics or icons that you want to keep next to a specific paragraph (such as the Tip and Warning icons used in this book). Another good use would be for cross-reference ("For More Information") text frames.

Converting existing frames to anchored frames

After you get the hang of when and how to use anchored frames, you'll likely want to convert some frames in existing documents into anchored frames. There's no direct way to do that in InDesign, but there is a somewhat circuitous path you can take:

1. **Use the Selection or Direct Selection tool to cut the existing frame that you want to make into an anchored frame by choosing Edit⇨Cut or by pressing ⌘+X or Ctrl+X.**

   You can also copy an existing frame by choosing Edit⇨Copy or by pressing ⌘+C or Ctrl+C.

2. **Switch to the Type tool and click in a text frame at the desired location to insert the text reference to the anchored frame.**

3. **Paste the cut or copied frame into that insertion point by choosing Edit⇨Paste or by pressing ⌘+V or Ctrl+V.**

   You now have an inline frame.

4. **Select the frame with the Selection tool, and then choose Object➪ Anchored Object➪Options to display the Anchored Object Options dialog box.**

   This dialog box looks like the Insert Anchored Options dialog box, shown in Figure 11-7, except that it doesn't include the top Object Options section.

5. **Choose Custom from the Position pop-up menu.**

   This converts the frame from an inline frame to an anchored frame.

6. **Adjust the position for the newly minted anchored frame as described in the previous section.**

7. **Click OK when you're done.**

Adjusting anchored frames

After you create an anchored frame, you can adjust its position.

A quick-and-dirty method is simply to click and drag anchored frames or use the Control panel to adjust their position. If the text the frame is anchored to moves, however, InDesign overrides those changes. (You can't manually move an anchored frame if the Prevent Manual Positioning option is selected in the Insert Anchored Object dialog box or Anchored Object Options dialog box. This option is deselected by default.)

For the most control of an anchored frame's position, choose Object➪ Anchored Object➪Options. The resulting Anchored Object Options dialog box is identical to the Insert Anchored Object dialog box (covered previously in this section and shown in Figure 11-7) but without the Object Options section.

And, of course, you can adjust the frame's other attributes as needed, such as strokes, fills, dimensions, rotation, and skew.

Releasing and deleting anchored frames

If you no longer want an anchored frame to be anchored to a text location, you can release the anchor. To do so, select the anchored frame with the Selection or Direct Selection tool and then choose Object➪Anchored Object➪Release.

It's also easy to delete an anchored frame: Select the frame with the Selection or Direct Selection tool and then choose Edit➪Clear or press Delete or Backspace. If you want to remove the object but keep it on the Clipboard for pasting elsewhere, choose Edit➪Cut or press ⌘+X or Ctrl+X.

Part IV
Text Essentials

"Well, shoot! This eggplant chart is just as confusing as the butternut squash chart and the gourd chart. Can't you just make a pie chart like everyone else?"

In this part . . .

Getting words on the page is an important part of what you do with InDesign. After you have the words in place, you want to tweak the letters and lines, and the space between them, to make your pages sparkle. This part shows you how to arrange words on the page, including words made up of exotic characters. You find out how to set text in columns and how to add bullets and numbers to that text. You also find out how to stretch, squeeze, rotate, and add special effects to text. Additionally, you see how to become skilled at using character and paragraph styles to make your life easier and to speed up your publishing workflow.