

Chapter 12

Putting Words on the Page

In This Chapter

- ▶ Creating text frames
 - ▶ Importing text
 - ▶ Threading text from frame to frame
 - ▶ Working with text columns
 - ▶ Wrapping text around objects
-

Text is more than words — it's also a layout element that flows through your pages in the locations that you need. Much of the work you do in InDesign will be controlling that flow and working with the text as blocks that need to have the right arrangement to fit your layout's goals.

This chapter helps you manage that flow and arrangement, showing you how to deftly maneuver the text through your layout, just as you would move your way through the dance floor.

After you have the steps nailed down, you can do the dance: bringing in text from your source files.

Working with Text Frames

When you're creating a simple layout, such as a single-page flier or a magazine advertisement, you will probably create text frames — the containers for text — as you need them. But if you're working on a book or a magazine, you'll want your text frames placed on master pages so your text will be consistently framed automatically when it appears on document pages. And you'll still have individual text frames you create for specific elements like sidebars.

Chapter 8 shows you how to create frames (including text frames), whereas Chapter 6 shows you how to create master pages. This chapter brings those two concepts together to show you how to work with text frames, both those in master pages and those you create in your document pages.

Creating master text frames

Master pages — predesigned pages that you can apply to other pages to automate layout and ensure consistency — can contain several types of text frames:

- ✓ Text frames containing standing text, such as page numbers or page headers.
- ✓ Text frames containing placeholder text for elements such as figure captions or headlines.
- ✓ One master text frame (an automatically placed text frame for flowing text throughout pages), which you create in the New Document dialog box (File⇨New⇨Document, or ⌘+N or Ctrl+N).

Think of a master text frame as an empty text frame on the default master page that lets you automatically flow text through a document. When you create a new document, you can create a master text frame at the same time. Here's how it works:

- 1. Choose File⇨New⇨Document or press ⌘+N or Ctrl+N.**
- 2. Check the Master Text Frame check box at the top of the New Document dialog box.**
- 3. Specify the size and placement of the master text frame by entering values in the Margins area for Top, Bottom, Inside, and Outside (or Left and Right if Facing Pages is unchecked) fields.**

InDesign places guides according to these values and places a text frame within the guides. The text frame fits within the boundaries of these values and those of the guides on the master page.

- 4. To specify the number of columns in the master text frame, enter a value in the Number field in the Columns area.**

You can also specify the amount of space between the columns by entering a value in the Gutter field.

- 5. Establish any other needed settings as described in Chapter 3.**

Check the Facing Pages check box if your pages will have different inside and outside margins (for example, a book might have different inside and outside margins for left-hand and right-hand pages).

- 6. Click OK to create a new document containing a master text frame.**

After you create a document with a master text frame, you'll see guides on the first document page that indicate the placement of the frame.

Creating individual text frames

Although the master text frame is helpful for containing body text that flows through a document, there's a good chance you'll need additional text frames on both master pages and document pages. Generally, these are smaller text frames that hold text such as headlines, sidebars, or captions.

To add text frames to a master page for repeating elements such as headers and footers, first display the master page. Choose Window⇧Pages or press ⌘+F12 or Ctrl+F12 to display the Pages panel. Then double-click the A-Master icon in the upper portion of the panel, as shown in Figure 12-1. That displays the A-Master master page. (If you have multiple master pages in your document, you can follow these instructions to add text frames to any of them. Just choose the desired master page.)

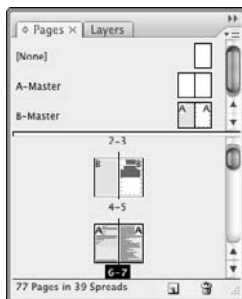
To add text frames to a document page, first go to the page. You can use any of the techniques described in Chapter 4 to move among pages.

Now draw the desired frame using any of the frame or shape tools, or the Type tool, as described in Chapter 8. Modify them with the Control panel (or Transform panel) or by using the mouse, also as described in that chapter.

Text frames you add to a master page will show up on any document pages based on that master page.



Figure 12-1:
To access a master page so you can add or modify text frames and other objects, double-click its master-page icon in the upper portion of the Pages panel.





If you're working on a document page and want to type inside a text frame placed on the page by a master page, select the Type tool and then Shift+⌘+click or Ctrl+Shift+click the frame.

Making changes to text frames

You're not confined to the settings you originally established when you set up a master text frame or an individual text frame — you may change the size, shape, and/or number of columns in the text frame later. Use the Selection tool to click the desired text frame and then modify it with the following options (the first six are covered in detail in Chapter 8):

- ✓ Change the placement of a selected master text frame by using the X: and Y: fields in the Control panel.
- ✓ Change the size of the master text frame by using the W: and H: fields.
- ✓ Change the angle by using the Rotation field.
- ✓ Change the skew by using the Shear X field.
- ✓ Enter values in the Scale fields to increase or decrease, by percentage amounts, the width and height of the text frame.
- ✓ Use the General pane of the Text Frame Options dialog box (Object⇨Text Frame Options, or ⌘+B or Ctrl+B, shown in Figure 12-2) to make further modifications:
 - Change the number of columns and the space between them.
 - Specify how far text is inset from each side of the frame.
 - Align text vertically within the frame.
 - Control the placement of the first baseline.
- ✓ Use the Baseline Options pane of the Text Frame Options dialog box to set a baseline grid, if desired, for the text to align to. Chapter 11 describes this feature in more detail.



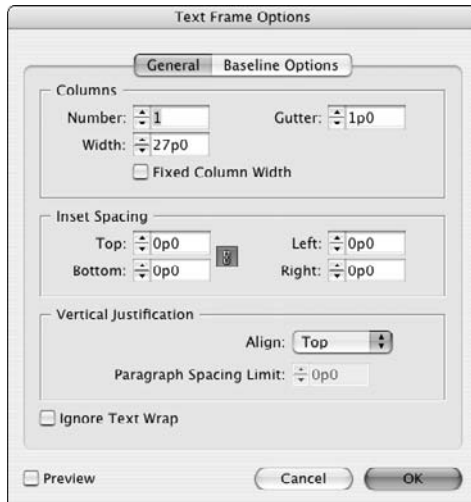
If you don't want the text inside this text frame to wrap around any items in front of it, check Ignore Text Wrap at the bottom of the dialog box.



If you open the Text Frame Options dialog box with no document open, any changes you make will become the default for all new documents.

- ✓ Specify character styles, paragraph styles, object styles, Story panel settings, text-wrap settings, and other text attributes to apply in the text frame to the document text you flow into that frame. (You can always override those attributes by applying other styles or formatting to the text later.) The rest of Part IV covers these other settings.

Figure 12-2: Change the properties of a text frame using the Text Frame Options dialog box.



Additionally, if you select the frame with the Direct Selection tool, you can change its shape by dragging anchor points on the frame to other positions, as described in Chapter 9.

Importing Text

You can import text from a word processor file (Word 97/98 or later, RTF, ASCII (text-only), or InDesign Tagged Text files) into an InDesign text frame using the Place dialog box (File⇨Place, or ⌘+D or Ctrl+D). You can also import Microsoft Excel spreadsheets (version 97/98 or later). Many of the text's original styles will remain intact, although you will want to review the imported text carefully to see if any adjustments need to be made.

Follow these steps to place imported text:

- 1. Choose File⇨Place, or press ⌘+D or Ctrl+D to open the Place dialog box.**
- 2. Locate the text file you want to import.**
- 3. To specify how to handle current formatting in the file, check the Show Import Options check box.**

This opens the appropriate Import Options dialog box for the text file's format. (Note that there are no import options for ASCII text.) Then click OK to return to the Place dialog box.

- 4. Click the Open button to import the text.**

5. If you selected an empty frame with the Type tool, InDesign will flow the text into that frame. If you selected a text frame with the Type tool, InDesign will flow the text at the text-insertion point in that frame, inserting the new text within the existing text.

If you hadn't already selected a frame before starting to import the text, specify where to place it by clicking and dragging the loaded-text icon to create a rectangular text frame, clicking in an existing frame, or clicking in any empty frame.



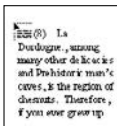
You can now select multiple files — text and/or graphics — by Shift+clicking a range or ⌘+clicking or Ctrl+clicking multiple files one by one. InDesign will let you place each file in a separate frame. Just click once for each file imported, or Shift+⌘+click or Ctrl+Shift+click to have InDesign place all files on the page in separate frames. The loaded-text icon will show the number of files to be placed, as well as a mini preview of each file, as Figure 12-3 shows. When placing files, you can use the keyboard left- and right-arrow keys to move through the thumbnail previews before clicking to place the one whose thumbnail preview is currently displayed, so you can place the files in any order you want.



You can't click on a master text frame — a text frame that is placed on the page by the master page in use — and simply start typing. To select a master text frame and add text to it, Shift+⌘+click or Ctrl+Shift+click it. (For more on master pages, see Chapter 6.)

Figure 12-3:

The new loaded-text icon showing multiple files selected and showing a preview of the first document.



Import options for Microsoft Word and RTF files

InDesign offers a comprehensive set of import options for Word and RTF files. With these options, you can control how these files will import into InDesign.

To save time on future imports, you can save your import preferences as a preset file for repeat use.

Figure 12-4 shows the Microsoft Word Import Options dialog box. The import options for RTF files are identical.

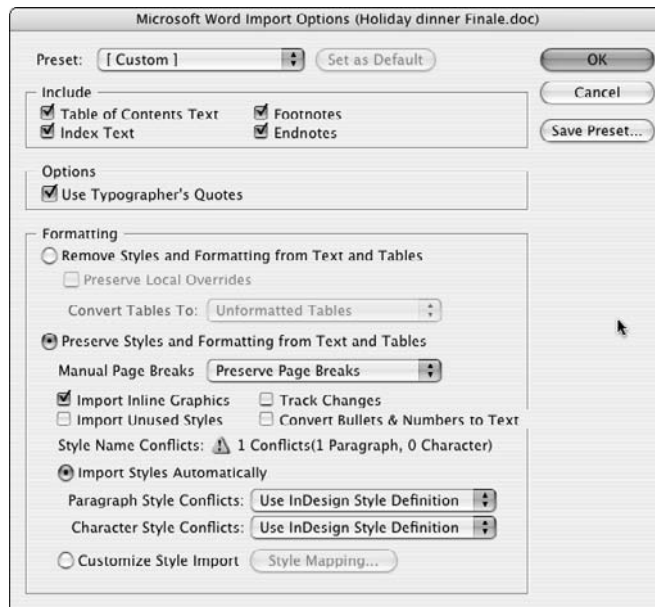


Figure 12-4:
The Import
Options
dialog box
for a
Word file.

The Preset pop-up menu, at the top of the page, lets you select from saved sets of import options. You can save the current settings by clicking the Save Preset button. And you can set a preset as the default import behavior by clicking the Set as Default button; these settings will be used for all Word file imports unless you choose a new default or make changes in this dialog box. This lets you avoid using the Import Options dialog box for your routine imports.

The Include section of the Import Options dialog box is where you decide whether to strip out specific types of text (Table of Contents Text, Index Text, Footnotes, and Endnotes) from the Word file. If you check items, their corresponding text will be imported. You probably won't want to import table-of-contents or index text because you can create much nicer-looking tables of contents and indexes in InDesign.

The third section, Options, has just one option: Use Typographer's Quotes. If this box is checked, InDesign converts keyboard quotes from your source file (' and ") to "curly" typographic quotes (‘ , ’ , “ , and ”).

The fourth section, Formatting, is fairly complex, so take it one step at a time. Start with deciding whether to remove or retain the formatting in your imported text.

To *remove* text formatting during import so that you can do the formatting in InDesign, select the Remove Styles and Formatting from Text and Tables option. You have two additional controls for this option:

- ✔ Preserve Local Overrides, which retains local formatting such as italics and boldface while ignoring the paragraph style attributes. You'd usually want this option checked so that meaning-related formatting is retained.
- ✔ You also can choose how tables are “unformatted” during import via the Convert Tables To pop-up menu. Unformatted Tables retains the table's cell structure but ignores text and cell formatting, while Unformatted Tabbed Text converts the table to tabbed text (with a tab separating what used to be cells and a paragraph return separating what used to be rows) and strips out any formatting. If you intend to keep tables as tables but format them in InDesign, choose Unformatted Tables.

To *retain* text formatting during import, so that the InDesign document at least starts out using the settings used in Word, choose the Preserve Styles and Formatting from Text and Tables option. This option includes several controls and bits of information:

- ✔ The Manual Page Breaks pop-up menu lets you retain any page breaks entered in Word, convert them to column breaks, or strip them out.
- ✔ Checking the Import Inline Graphics check box will enable the import of any graphics in the Word text.
- ✔ Checking the Import Unused Styles check box means that all Word style sheets will transfer into InDesign, rather than just the ones you actually applied to text in the file. Unless you want all those extra Word styles, keep this box unchecked.
- ✔ Checking the Track Changes check box preserves the revisions tracking information from Word so you can see it in the companion Adobe InCopy editing program. But InDesign itself does not display or let you use that tracking information. This book does not cover the expert InCopy add-on software.
- ✔ Checking Convert Bullets & Numbers to Text removes any automatic bullet and numbering lists in Word, converting the bullets and numbers into the actual characters. If you select this option, and insert an item in an imported numbered list, the list won't renumber automatically, as it would if you leave this unchecked. (In previous versions of InDesign, bullets and numbers were converted, eliminating the automatic aspect.)



- ✔ If InDesign detects that the Word file has a style with the same name as your InDesign document, it will note how many to the right of the Style Name Conflicts label. You have choices in how to handle these conflicts:
 - Use InDesign Style Definition preserves the current InDesign style sheets and applies them to any text in Word that uses a style sheet of the same name. Redefine InDesign Style causes the Word style sheet's formatting to permanently replace that of InDesign's style sheet. Auto Rename renames the Word file's style sheet and adds it to the Paragraph Styles or Character Styles panel. This preserves your existing InDesign style sheets while also preserving those imported from the Word file.
 - Customize Style Import lets you decide which specific InDesign styles override same-name Word styles, which Word styles override same-name InDesign styles, and which Word styles are renamed during import to prevent any overriding.

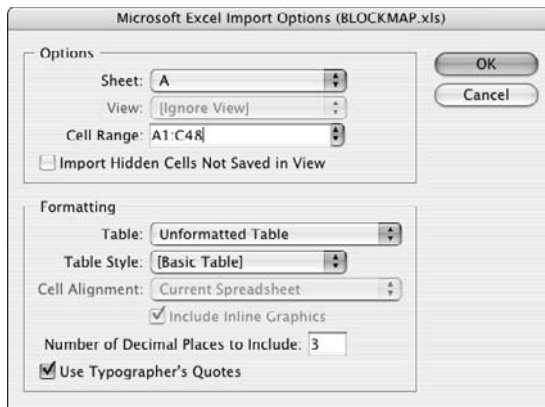
Import options for Microsoft Excel files

When importing Excel spreadsheets, you have several options, as Figure 12-5 shows.

In the Options section, you can control the following settings:

- ✔ The Sheet pop-up menu lets you choose which sheet in an Excel workbook to import. The default is the first sheet, which is usually named Sheet1 unless you renamed it in Excel. (If you want to import several sheets, you'll need to import the same spreadsheet several times, choosing a different sheet each time.)
- ✔ The View pop-up menu lets you import custom views that are defined in Excel for that spreadsheet. If the spreadsheet has no custom views, this pop-up menu is grayed out. You can also ignore any custom views by choosing [Ignore View] from the pop-up menu.
- ✔ In the Cell Range pop-up menu, you specify a range of cells using standard Excel notation *Sx:Ey*, where *S* is the first row, *x* the first column, *E* the last row, and *y* the last column, such as A1:G35. You can enter a range directly in the pop-up menu, which also acts as a text-entry field, or choose a previously entered range from the pop-up menu.
- ✔ Checking the Import Hidden Cells Not Saved in View check box will import hidden cells. Be careful when doing so, because these cells are usually hidden for a reason (typically, they show interim calculations and the like).

Figure 12-5:
The Import
Options
dialog box
for an Excel
file.



In the Formatting section, you can control the following settings:



- ✓ In the Table pop-up menu, you choose from Formatted Table, which imports the spreadsheet as a table and retains text and cell formatting; Unformatted Table, which imports the spreadsheet as a table but does not preserve formatting; and Unformatted Tabbed Text, which imports the spreadsheet as tabbed text (tabs separate cells and paragraph returns separate rows) with no formatting retained.
- ✓ In the Table Style pop-up menu, you choose an InDesign table style to apply to the imported table, or leave it alone (by choosing [No Table Style]).
- ✓ In the Cell Alignment pop-up menu, you tell InDesign how to align the text in cells. You can retain the spreadsheet's current alignment settings by choosing Current Spreadsheet, or override them by choosing Left, Right, or Center.
- ✓ Checking the Include Inline Graphics check box imports any graphics placed in the Excel cells.
- ✓ The Number of Decimal Places to Include field is where you enter how many decimal places to retain for numbers.
- ✓ Check the Use Typographer's Quotes check box to convert keyboard quotes (' and ") to the “curly” typographic quotes (‘, ’, “, and ”). It's a good idea to keep this box checked.

Pasting text into an InDesign document

As you probably already know, you can hold text on the Mac or Windows Clipboard by cutting it or copying it from its original location. After you've captured some text on the Clipboard, you can paste it into an InDesign document at the location of the cursor. You can also replace highlighted text with

the text that's on the Clipboard. If no text frame is active when you do the pasting, InDesign creates a new text frame to contain the pasted text.

InDesign uses standard menu commands and keyboard commands for cutting/copying text to the Clipboard, and for pasting text. On the Mac, press $\mathbb{C}+X$ to cut, $\mathbb{C}+C$ to copy, and $\mathbb{C}+V$ to paste. In Windows, press $\text{Ctrl}+X$ to cut, $\text{Ctrl}+C$ to copy, and $\text{Ctrl}+V$ to paste.

Text that is cut or copied from InDesign normally retains its formatting, whereas text pasted from other programs loses its formatting. But you can specify whether pasted text from other programs always retains its formatting. Go to the Clipboard Handling pane in the Preferences dialog box (choose $\text{InDesign} \rightarrow \text{Preferences} \rightarrow \text{Clipboard Handling}$ or press $\mathbb{C}+K$ on the Mac, or choose $\text{Edit} \rightarrow \text{Preferences} \rightarrow \text{Clipboard Handling}$ or press $\text{Ctrl}+K$ in Windows) and select the All Information option in the When Pasting Text and Tables from Other Applications section. If you select this option, you can still tell InDesign to *not* preserve the formatting on a case-by-case basis by choosing $\text{Edit} \rightarrow \text{Paste without Formatting}$ ($\text{Shift}+\mathbb{C}+V$ or $\text{Ctrl}+\text{Shift}+V$).

Dragging and dropping text

You can drag highlighted text from other programs — or even text files from the desktop or a folder — into an InDesign document. Text that you drag and drop is inserted at the location of the cursor, replaces highlighted text, or is placed in a new rectangular text frame.

Keep characters to a minimum

When you're working with text in a professional publishing application, such as InDesign, you need to keep in mind some differences between the professional method and traditional way of typing:

- ✔ Remember that you don't need to type two spaces after a period or colon; books, newspapers, magazines, and other professional documents all use just one space after such punctuation.
- ✔ Don't enter extra paragraph returns for space between paragraphs and don't enter tabs to indent paragraphs — instead, set up this formatting using InDesign's paragraph attributes ($\text{Type} \rightarrow \text{Paragraph}$, or $\text{Option}+\mathbb{C}+T$ or $\text{Ctrl}+\text{Alt}+T$).
- ✔ To align text in columns, don't enter extra tabs; place the same number of tabs between each column, and then align the tabs ($\text{Type} \rightarrow \text{Tabs}$, or $\text{Shift}+\mathbb{C}+T$ or $\text{Ctrl}+\text{Shift}+T$).

To see where your InDesign document has tabs, paragraph breaks, spaces, and other such invisible characters, use the command $\text{Option}+\mathbb{C}+I$ or $\text{Ctrl}+\text{Alt}+I$, or choose $\text{Type} \rightarrow \text{Show Hidden Characters}$.



When you drag and drop a text selection, its original formatting is usually retained — unless you hold the Shift key when dragging. If you hold the Shift key, the text takes on the attributes of the text you drag it into.

When you drag and drop a text *file*, the process is more like a text import: The text retains its formatting and styles. Unlike the Place command (File⇨Place, or ⌘+D or Ctrl+D) that imports text, drag and drop does not give you the option to specify how some of the formatting and styles in the imported text file are handled.

Threading Text Frames

The text that flows through a series of frames is what InDesign considers a *story*, and the connections among those frames are called *threads*. When you edit text in a threaded story, the text reflows throughout the text frames. You can also spell-check and do a find/change operation for an entire story, even though you have just one of the story's text frames active on-screen.

When you have threaded text frames, you'll see visual indicators on your text frame, assuming you choose View⇨Show Text Threads (Option+⌘+Y or Ctrl+Alt+Y) and have selected the frame with one of the selection tools. At the lower right of the text frame is a small square, called the *out port*, that indicates the outflow status:

- ✓ If the square is empty, that means there is no text flowing to another frame, and not enough text to flow to another frame.
- ✓ If the square is red and has a plus sign in it, that means there is more text than fits in the selected frame but that it is *not* flowing to another frame. This is called *overset text*.
- ✓ If the square has a triangle icon, that means the text is flowing to another frame. That doesn't mean that text *is* flowing, just that if there is more text than the current frame can hold, it *will* flow.

Similarly, there's an *in port* at the upper left of a text frame that indicates whether text is flowing from another frame into the current frame:

- ✓ If the square is empty, that means there is no text flowing from another frame, making this frame the first (and perhaps only) frame in a story.
- ✓ If the square has a triangle icon, that means the text is flowing from another frame. That doesn't mean that text *is* flowing, just that if there is more text than the other frame can hold, it *will* flow into this frame.

So how do you thread the frames in the first place? You have three options in InDesign: manual, semi-autoflow, and autoflow. Each of these options has its own icon. The method you choose depends on the amount of text you're dealing with and the size and number of your text frames:



✓ To link two text frames across several pages (for example, for an article that starts on page 2 and continues on page 24), you might use the manual method, in which you click the first text frame's out port and then click on the second text frame.



✓ To link a succession of text frames, you might want to use the semi-autoflow method, which allows you to click a series of text frames to flow text from one frame to the next.



✓ To import text that is intended for long documents (such as a book chapter or brochure), you might want to use the autoflow method to add text frames and pages that accommodate the text you're importing.



For a quick glance at your text threads while you're threading text across pages, simply change the document view briefly to 20 percent or so.



Text flows in the order in which you select frames. If you move a frame, its order in the text flow remains unchanged. If you're not careful, you could, for example, accidentally have text flow from a frame at the top of the page to a frame at the bottom of a page and then to one in the middle of a page.

Threading frames manually

To thread text frames manually, you simply use a selection tool to link out ports to in ports. You can pre-thread existing text frames by linking empty text frames and add text later, or you can create threads from a text frame that contains text.



Always switch to a selection tool when you're threading frames. Oddly, you cannot thread frames while the Type tool is selected. Oh well.

To thread text frames, follow these steps:

- 1. Create a series of text frames that will hold the text you import.**

These text frames do not need to be on the same page.

- 2. Click either the Selection tool or the Direct Selection tool.**

- 3. Click the out port of the first text frame in the thread.**

The pointer becomes the loaded-text icon.

4. Click the in port of the second text frame in the thread.

You can also click any empty frame or click and drag to draw a new text frame. How text flow behaves depends on the text frame's status:

- If the first frame held no text, any text placed or typed in later will flow into the second frame if it doesn't all fit in the first text frame.
- If the first frame held text but was not already linked to another text frame, any overset text will flow into the existing text frame.
- If the first text frame was already linked to another text frame, the text will now be redirected to the text frame you just selected.

5. Use the Pages panel to add or switch pages while you continue clicking out ports and in ports until your chain of threaded text frames is complete.

You can also switch pages using the page controls at the bottom of the document window, by choosing Layout→Go to Page, or pressing ⌘+J or Ctrl+J.

6. When you're finished threading text frames, select another object on the page or select another tool.

A story imported into any text frame in this chain will start in the upper-right corner of the first frame and flow through the frames in the same order as the threads.

Threading frames with the semi-autoflow method

InDesign includes a *semi-autoflow* method of threading text frames, which incorporates a few automatic shortcuts but varies only slightly from the manual method. Follow the same steps for threading text frames manually, except hold down the Option or Alt key each time you click in the next text frame. Doing so lets you bypass the in ports and out ports and simply click from text frame to text frame to establish links.



If you want to begin a semi-autoflow process when you place a word-processing file for the first time, you can Option+click or Alt+click in the first text frame that will hold the placed text.

As you're threading frames, Option+click or Alt+click each text frame, or you'll revert to manual threading.

Threading frames and automatically adding pages

You can flow a lengthy story quickly through a document using the autoflow method for threading frames. You can either autoflow text into the master text frame or into automatically created text frames that fit within the column guides. InDesign flows the text into any existing pages, and then adds new pages based on the current master page. You can initiate autoflow before or after placing a word processing file.

Placing text while autoflowing

If you haven't imported text yet, you can place a file and have it automatically flow through the document. This method works well for flowing text into pages that are all formatted the same way (as in a book). Here's how it works:

- 1. Before you begin, check your master page.**

Make sure that the master page you're using includes a master text frame or appropriate column guides.

- 2. With no text frames selected, choose File⇨Place or press ⌘+D or Ctrl+D.**

- 3. Locate and select the word-processing file you want to import, and then click Open.**

- 4. When you see the loaded-text icon, Shift+click in the first column that will contain the text. Be sure to Shift+click near the upper-left corner of the master text frame, so InDesign uses that frame rather than create a new one.**

InDesign adds all the necessary text frames and pages, and flows in the entire story.

Autoflowing after placing text

Even if you've already placed a text file into a single text frame or a threaded chain of text frames, you can still autoflow text from the last text frame. To do this, click the out port, and then Shift+click any page to indicate where to start the autoflow.

You might use this method if you're placing the introduction to an article in an elaborately designed opener page. Then you can flow the rest of the article into standard pages.

Breaking and rerouting threads

After text frames are threaded, you have three options for changing the threads: You can break threads to stop text from flowing, insert a text frame

into an existing chain of threaded text frames, and remove text frames from a thread. Here are the techniques in a nutshell:

- ✓ Break the link between two text frames by double-clicking either an out port or an in port. The thread between the two text frames is removed, and all text that had flowed from that point is sucked out of the subsequent text frames and stored as overset text.
- ✓ Insert a text frame after a specific text frame in a chain by clicking its out port. Then, click and drag the loaded-text icon to create a new text frame. That new frame is automatically threaded to both the previous and the next text frames.
- ✓ Reroute text threads — for example, to drop the middle text frame from a chain of three — by clicking the text frame with the Selection tool and then pressing Delete or Backspace. This deletes the text frame and reroutes the threads. You can also Shift+click to multiple-select text frames to remove. Note that you cannot reroute text threads without removing the text frames.

Working with Columns

Where you place columns on the page — and the amount of space you allow between columns — has a big impact on readability. Used with a little know-how, column width works with type size and leading to make text easier to read. Columns help you keep from getting lost from one line to the next, and from getting a headache as you're trying to read the words on the page.



Generally, as columns get wider, the type size and leading increase. For example, you might see 9-point text and 15-point leading in 2½-inch columns, whereas 15-point text and 13-point leading might work better in 3½-inch columns.

InDesign lets you place columns on the page automatically, create any number of columns within a text frame, and change columns at any time.

Specifying columns in master frames

You can specify the number of columns at the same time you create a *master text frame* — a text frame placed automatically within the margin guides.

In the Columns area in the New Document dialog box, use the Number field to specify how many columns, and the Gutter field to specify how much space to place between the columns. (The gutter is the space between columns.) Whether or not you check Master Text Frame (which makes the frame appear on all pages), guides for these columns will still be placed on the page and can be used for placing text frames and other objects.

Changing columns in text frames

You can change the number of columns in a text frame (whether an individual text frame or a master text frame), even after you've flown text into the frame — and doing so isn't difficult. First, select the text frame with a selection tool or the Type tool (or Shift+click to select multiple text frames and change all their columns at once). Then choose Object⇨Text Frame Options, or press ⌘+B or Ctrl+B, and set the desired Number and Gutter values in the General pane of the Text Frame Options dialog box, shown in Figure 12-2.

You can also use the Control panel to quickly change the number of columns, but note that this control will not display on a monitor set below 1152-x-870-pixel resolution unless you customize the Control panel interface (to disable other controls to make room for this one) using the Customize command in its flyout menu.



Some designers like to draw each column as a separate frame. I strongly recommend against this practice; it's too easy to create columns of slightly different widths and slightly different positions, so text doesn't align properly. Instead, specify columns in your text frames so you won't have to worry about sloppy layouts.

Note that the options in the Columns area of the Text Frame Options dialog box work differently depending on whether Fixed Column Width is checked or unchecked:

- ✓ If Fixed Column Width is unchecked, InDesign subtracts from the text frame the space specified for the gutters, and then divides the remaining width by the number of columns to figure out how wide the columns can be. For example, if you specify a 10-inch-wide text frame with three columns and a gutter of $\frac{1}{2}$ inch, you end up with three 3-inch columns and two $\frac{1}{2}$ -inch gutters. The math is $(10 - [2 \times 0.5]) \div 3$.
- ✓ If Fixed Column Width is checked, InDesign resizes the text frame to fit the number of columns you selected at the indicated size, as well as the gutters between them. For example, suppose you're using a 10-inch-wide text frame with a column width of 5 inches and a gutter of $\frac{1}{2}$ inch, and you choose three columns: You end up with a 15-inch-wide text frame containing three 5-inch columns and two $\frac{1}{2}$ -inch gutters. The math is $(5 \times 3) + (2 \times 2)$.

Check Preview to see the effects of your changes before finalizing them.

Wrapping Text around Objects

In the days before personal computers and page-layout software, wrapping text around a graphic or other object was a time-consuming and expensive

task. Text wraps were rare, found only in the most expensively produced publications. Not any more. Not only do all page-layout programs let you create text runarounds, most programs — including InDesign — provide several options for controlling how text relates to graphics and other objects that obstruct its flow.

When a frame is positioned in front of a text frame, InDesign provides the following options. You can

- ✓ Ignore the frame and flow the text behind it.
- ✓ Wrap the text around the frame's rectangular bounding box.
- ✓ Wrap the text around the frame itself.
- ✓ Jump the text around the frame (that is, jump the text from the top of the frame to the bottom).
- ✓ Jump the text to the next column or page when the text reaches the top of frame.
- ✓ Specify the amount of distance between the text and the edge of the obstructing shape.
- ✓ Flow text within the obstructing shape rather than outside it.



InDesign lets you wrap text around frames on hidden layers — as well as remove text wrap for objects on hidden layers. This is handy when you want to hide images or other distracting items but preserve the layout. See Chapter 5 for details on using layers.



If you want to wrap text around only a portion of a graphic — perhaps you need to isolate a face in a crowd — the best solution is to open the graphics file in its original program, create a clipping path around that portion, and then resave the file and import it and its clipping path into an InDesign document (clipping paths are explained in Chapter 19).

The Text Wrap panel

The controls in the Text Wrap panel (see Figure 12-6) let you specify how a selected object will affect the flow of text behind it. Remember, the flow of text around an obstructing object is determined by the text wrap settings applied to the obstructing object.



You can override the text-wrap settings of objects that are in front of a text frame by telling the text frame to ignore them. To do so, click a text frame, and then choose Object⇨Text Frame Options or press ⌘+B or Ctrl+B. In the Text Frame Options dialog box's General pane, select Ignore Text Wrap, and then click OK. Text in the frame will now flow behind any obstructing items regardless of the text-wrap settings applied to them.



The Text Wrap panel has three options that may not display when you open it: Wrap Options, Contour Options, and Include Inside Edges. You can more easily hide/show these functions by double-clicking the double-arrow symbol to the left of the Text Wrap label in the panel's tab or by choosing Hide Options/Show Options from the flyout menu.

Here's how to apply text-wrap settings to a frame or other object:

1. **If the Text Wrap panel is not displayed, choose Window⇨Text Wrap or press Option+⌘+W or Ctrl+Alt+W.**
2. **Click any of the selection tools.**
3. **Click the object to which you want to apply text-wrap settings.**

The object can be anywhere, but you'll probably want to position it on top of a text frame that contains text so you can see the results of the settings you apply.

4. **Click one of the five text-wrap iconic buttons at the top of the Text Wrap panel.**

The iconic buttons show you what each wrap does conceptually.

5. **If you want, adjust the space between the surrounding text and the obstructing shape by typing values in the Top Offset, Bottom Offset, Left Offset, and Right Offset fields.**

These fields are not available if you click the No Text Wrap button. If the object is a rectangle, all four fields are available if you click the Wrap around Bounding Box button or Wrap around Object Shape. Only the Top Offset field is available if you click the Wrap around Object Shape button for a free-form shape or the Jump to Next Column button. The Top Offset and Bottom Offset fields are available if you click the Jump Object button.



If the Make All Settings the Same iconic button displays a chain, then changing any of the offset values will cause the other offset values to match. If the icon shows a broken chain, each offset value is independent of the others. Click the button to switch between these two modes.

6. **Select Invert if you want to flow the text in the obstructing shape.**
7. **If you choose the Wrap around Object Shape button and there is a graphic in the frame, you can also select from the Contour Options's Type pop-up menu.**

There are six options:

- Bounding Box is the same as clicking the Wrap around Bounding Box button.
- Detect Edges tries to determine the graphic's outside boundary by ignoring white space — you would use this for bitmapped images that have a transparent or white background.



- Alpha Channel uses the image’s alpha channel, if any, to create a wrapping boundary (see Chapter 19).
- Photoshop Path uses the image’s clipping path, if any, to create a wrapping boundary (see Chapter 19).
- Graphic Frame uses the frame’s boundary rather than the bounding box.
- Same as Clipping uses the clipping path for the graphic created in InDesign (see Chapter 19).

8. You can control how text wraps around an object that splits a column by choosing an option from the Wrap To pop-up menu.

The options are Right Side, Left Side, Both Left and Right Sides, Side Towards Spine, Side Away from Spine, and Largest Area. You’ll rarely choose Both Left and Right Sides, because unless the object is small, readers’ eyes will stop at the interposed object and not see the rest of the text on the other side of it. Use either of the spine options to have the text stay on the outside or inside of a page, relative to the object, based on whether the page is right-facing or left-facing. You’ll often choose Largest Area because that gives the text the most space next to the interposed object, which tends to be what looks good in many situations.

9. By selecting the Include Inside Edges option, InDesign lets text appear inside any interior “holes” in the graphic. You’ll rarely use this technique because in most cases it’s hard for the reader to follow text that wraps around an image, flows inside it, and then continues to flow outside it. But if the interior is large enough and not too distant from the text that flows on the outside, this effect might be readable.

Figure 12-6:
The Text Wrap panel and its flyout menu, with a wrap applied to the object at left.



If you specify text-wrap settings when no objects are selected, the settings are automatically applied to all new objects.



To apply text-wrap settings to a master item on a document page, press and hold Shift+⌘ or Ctrl+Shift to select the item, and then use the controls in the Text Wrap panel as just described. If you don't want the text wrap applied to existing document items, just to new ones, choose Apply to Master Page Only in the flyout menu.

Setting text-wrap preferences

There are several global text-wrap options you should be aware of, all of which are accessed via the Composition pane of the Preferences dialog box (choose InDesign⇨Preferences⇨Composition or press ⌘+K on the Mac, or choose Edit⇨Preferences⇨Composition or press Ctrl+K in Windows). Here are the options:

- ✓ **Justify Text Next to an Object.** This option is useful when you have left-aligned text that wraps around an object at the right. (It also works if you have right-aligned text that wraps around an object at the left.) This can lead to an awkward wrap, however, because InDesign won't try to make the text align precisely to the wrap's contour (because the text isn't justified). Use this option to justify the text just around the wrap, and then continue using the text's specified non-justified alignment.
- ✓ **Skip by Leading.** This option makes text wrap below or above an object based on the text's leading, so there's at least a full line space between the text and the object, even if the object's text-wrap settings would allow less space.
- ✓ **Text Wrap Only Affects Text Beneath.** This option, if selected, prevents text frames placed on top of an object from wrapping, while those behind the graphic frame will still be allowed to wrap. This option allows some text to overlap the graphic and other text to wrap around it. Note this is a global setting, affecting all objects. To override wrap settings of individual text frames, choose Object⇨Text Frame Options, or press ⌘+B or Ctrl+B, and enable the Ignore Text Wrap option in the General pane.

Chapter 13

The Ins and Outs of Text Editing

In This Chapter

- ▶ Editing text in your layout
 - ▶ Using the Story Editor
 - ▶ Searching and replacing words and formats
 - ▶ Checking spelling as you type or all at once
 - ▶ Customizing the spelling and hyphenation dictionaries
-

Whether you import text or type it into text frames directly in InDesign, you'll appreciate the tools that let you edit that text, search and replace, spell-check, and hyphenate your text. You'll find out all about these capabilities in this chapter.

To do anything with text, you need to use the Type tool. When the Type tool is selected, you can click in any empty frame. (If it's not already a text frame, it will become one automatically when you click it with the Type tool.) Or you can click and drag to create a new text frame. You can even click in an existing block of text. From this point, start typing to enter text.

Chapter 8 gets into more of the nitty-gritty of creating frames. And you can discover all about importing text in Chapter 12.

Editing Text

InDesign offers basic editing capabilities, not unlike those found in a word processor: cutting and pasting, deleting and inserting text, searching and replacing of text and text attributes, and spell checking. (Cutting, pasting, inserting, and deleting text works just like it does for any standard Mac or Windows program, so I won't repeat those details for you here.)

Controlling text view

In many layout views, the text is too small to work with. Generally, you zoom in around the block of text using the Zoom tool. Select the tool, and then click to zoom in. To zoom out, hold the Option or Alt key when clicking.

Another way to zoom in is to use the keyboard shortcut $\mathbb{C}+=$ or $\text{Ctrl}+=$. Each time you use it, the magnification increases. (Zoom out via $\mathbb{C}+-$ [hyphen] or $\text{Ctrl}+-$ [hyphen].)

In addition to seeing the text larger, zooming in also helps you see the spaces, tabs, and paragraph returns that exist in the text. Choose $\text{Type} \rightarrow \text{Show Hidden Characters}$ or press $\text{Option}+\mathbb{C}+I$ or $\text{Ctrl}+\text{Alt}+I$ to have the nonprinting indicators for those characters display.

Navigating through text

To work at a different text location in your InDesign document, click in a different text frame or another location in the current text frame. You can also use the four arrow (cursor) keys on the keyboard to move one character to the right, one character to the left, one line up, or one line down. Hold \mathbb{C} or Ctrl when pressing the arrow keys to jump one word to the right or left, or one paragraph up or down. The Home and End keys let you jump to the beginning or end of a line; hold \mathbb{C} or Ctrl when pressing those keys to jump to the beginning or end of a story. (A *story* is text within a text frame or that is linked across several text frames.)

Highlighting text

To highlight (or select) text, you can click and drag. Or you can use some keyboard options. For example, $\text{Shift}+\mathbb{C}+\text{right arrow}$ or $\text{Ctrl}+\text{Shift}+\text{right arrow}$ highlights the next word to the right. Likewise, $\text{Shift}+\mathbb{C}+\text{End}$ or $\text{Ctrl}+\text{Shift}+\text{End}$ highlights all the text to the end of the story.

To highlight a word, double-click (this will not select its punctuation) and triple-click to select the entire paragraph. If you're highlighting a word and also want to include the punctuation that follows the word, double-click, and then press $\text{Shift}+\mathbb{C}+\text{right arrow}$ or $\text{Ctrl}+\text{Shift}+\text{right arrow}$ to extend the selection.

To select an entire story, choose $\text{Edit} \rightarrow \text{Select All}$, or press $\mathbb{C}+A$ or $\text{Ctrl}+A$.

To deselect text, choose Edit⇨Deselect All or press Shift+⌘+A or Ctrl+Shift+A. An even easier way to deselect text is simply to select another tool or click another area of the page.

Undoing text edits

It's nice to know that InDesign makes it easy for you to change your mind about text edits. Choose Edit⇨Undo and Edit⇨Redo any time you change your mind about edits. The Undo and Redo keyboard commands are definitely worth remembering: ⌘+Z and Shift+⌘+Z or Ctrl+Z and Ctrl+Shift+Z.

Using the Story Editor

The Story Editor is a window that lets you see your text without the distractions of your layout. In it, you see your text without line breaks or other nonessential formatting — you just see attributes like boldface and italics, as well as the names of the paragraph styles applied in a separate pane to the left (see Figure 13-1). After clicking in a text frame, you open the Story Editor by choosing Edit⇨Edit in Story Editor or by pressing ⌘+Y or Ctrl+Y.

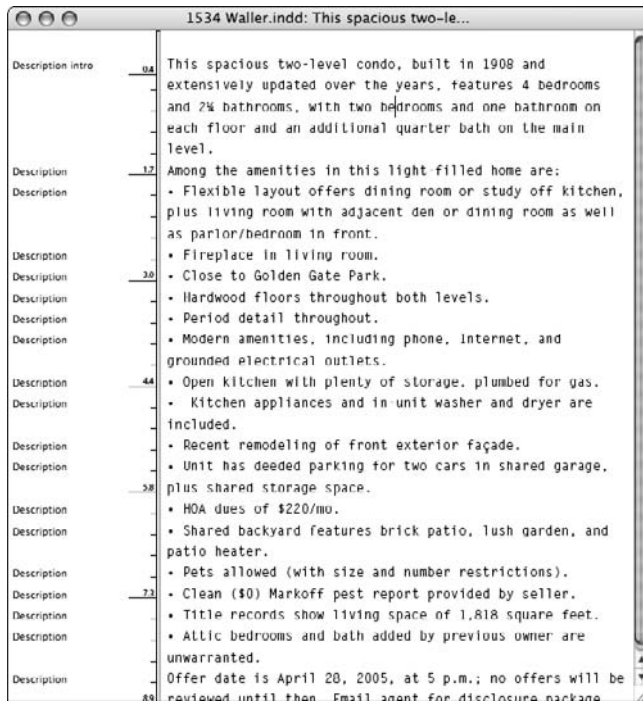


Figure 13-1:
The Story
Editor.

In the Story Editor, you use the same tools for selection, deletion, copying, pasting, and search and replace as you would in your layout. The Story Editor is not a separate word processor; it's simply a way to look at your text in a less distracting environment for those times when your mental focus is on the meaning and words, not the text appearance.

The Story Editor also shows you the column depth for text, using a ruler along the left side of the text, just to the right of the list of currently applied paragraph styles. Overset text (text that goes beyond the text frame, or beyond the final text frame in a threaded story) is indicated by a depth measurement of *OV* and is furthermore noted with a red line to the right of the text.

Searching and Replacing Text

InDesign has a handy Find/Change feature (Edit⇨Find/Change, or ⌘+F or Ctrl+F) that is similar to the search-and-replace features with which you may already be familiar if you've used any word processor or page-layout application. With the Find/Change dialog box, you can find and change text or you can extend the search to include attributes. Before starting a Find/Change operation, first determine the scope of your search:

- ✓ To search within a text selection, highlight the selection.
- ✓ To search from one point in a story to its end, click the cursor at that beginning location.
- ✓ To search an entire story, select any frame or click at any point in a frame containing the story.
- ✓ To search an entire document, simply have that document open.
- ✓ To search multiple documents, open all of them (and close any that you don't want to search).

Then choose the appropriate search scope — InDesign's term for *range* — using the Search pop-up menu and the scope iconic buttons below it.

Figure 13-2 shows the Find/Change dialog box.



InDesign CS3 adds a lot of new features to the Find/Change dialog box, including a new interface, the ability to search for special characters (glyphs), the ability to search for object attributes (see Chapter 9), and the ability to save search/replace queries so you can use them repeatedly. (It also lets you use the Unix `grep` syntax for conducting criteria-based searches; this feature is for experts familiar with `grep` searching and so is not covered in this book.)

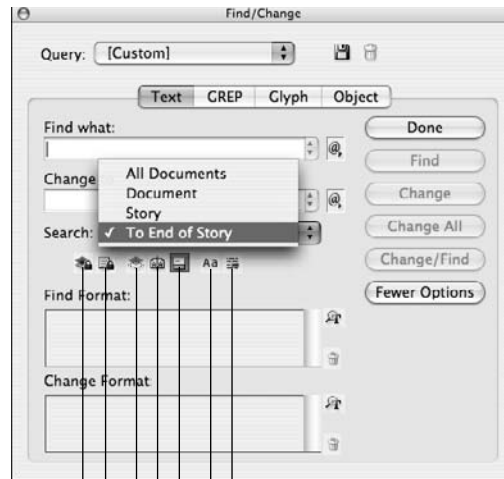


Figure 13-2:
The Find/
Change
dialog box.

Include Locked Layers
 Include Locked Stories
 Include Hidden Layers
 Include Master Pages
 Whole Word
 Case-Sensitive
 Include Footnotes

Replacing text

To search for text, follow these steps:

1. **Determine the scope of your search, open the appropriate documents, and insert the text cursor at the appropriate location.**

2. **Choose Edit⇨Find/Change or press ⌘+F or Ctrl+F.**

Go to the Text pane if it's not already displayed.

3. **Use the Search pop-up menu, as shown in Figure 13-2, to specify the scope of your search by choosing All Documents, Document, Story, To End of Story, or Selection.**

Unavailable options won't display, such as Selection in Figure 13-2.

4. **Type or paste the text you want to find in the Find What field.**

To use special characters, use the Special Characters for Search pop-up list (the icon to the right of the Find What field) to select from a menu of special characters (see Figure 13-3).

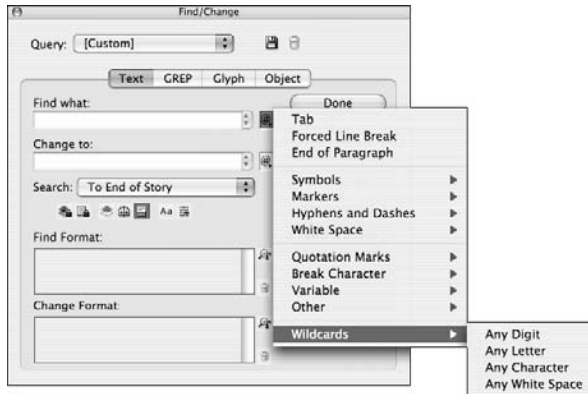
5. **Type or paste the replacement text into the Change To field.**

To use special characters, use the Special Characters for Replace pop-up list (to the right of the Find What field).

- Specify any additional parameters for your search by selecting or deselecting the seven iconic buttons at the bottom of the pane: **Include Locked Layers, Include Locked Stories, Include Hidden Layers, Include Master Pages, Include Footnotes, Case Sensitive, and Whole Word.**

If an icon's background darkens, it is selected.

Figure 13-3:
The special characters pop-up list in the Find/Change dialog box.



- To search for or replace with specific formatting, use the Format buttons.**

These buttons are available only if you had clicked the More Options button. (Look for details later in this section.)

- Click the Find button to start the search.**

After the search has begun, click the Find Next button (it changes from the Find button after you start the search) to skip instances of the Find What text, and click the Change, Change All, or Change/Find buttons as appropriate. (Clicking the Change button simply changes the found text, clicking the Change All button changes every instance of that found text in your selection or story, and clicking the Change/Find button changes the current found text and moves on to the next occurrence of it — it basically does in one click the actions of clicking Change and then Find Next.)

If you use the Change All feature, InDesign reports how many changes were made. If the number looks extraordinarily high and you suspect the Find/Change operation wasn't quite what you wanted, remember that you can use InDesign's undo function (Edit⇨Undo, or ⌘+Z or Ctrl+Z) to cancel the search and replace, and then try a different replace strategy.

- Click the Done button when you're finished doing the finding and replacing.**

The solution to missing fonts

Sometimes, when you open a document, InDesign tells you that it can't find the fonts used in the documents on your computer. You get the option of finding the missing fonts, which opens the Find Fonts dialog box. This dialog box shows the names of all missing fonts; if you select one, you can change all occurrences of that font to one that you do have by selecting a new font family and font style from the menus at the bottom of the dialog box and then clicking Change All. New to InDesign CS3 is the Redefine

Style When Changing All check box, which, if selected, ensures that any font replaced is also replaced in any paragraph and character styles that used the original font.

Of course, another — often preferable — solution is to get the fonts installed on your computer. After all, the design shouldn't change just because you don't happen to have the needed fonts on your computer.

Replacing formatting

To find and change formatting or text with specific formatting, use the expanded Find/Change dialog box. For example, you might find all the words in 14-point Futura Extra Bold and change them to 12-point Bodoni.

To replace text formatting, follow these steps:

- 1. To add formats to a Find/Change operation for text, click the More Options button in the Find/Change dialog box (if it was not clicked earlier).**

The dialog box expands to include the Find Format Settings and Change Format Settings areas.

- 2. Use the Format buttons to display the Find Format Settings and Change Format Settings dialog boxes, which let you specify the formats you want to find.**

Your options are Style Options (paragraph and character styles), Basic Character Formats, Advanced Character Formats, Indents and Spacing, Keep Options, Bullets and Numbering, Character Color, OpenType Features, Underline Options, Strikethrough Options, and Drop Caps and Other. You can change multiple attributes at once by making selections from as many panes as needed.

Open one of these dialog boxes, select the desired formatting to search or replace, and then click OK when done. Now open the other dialog box to select its formatting, and then click OK when done.

- 3. Click Find Next and then Change to change the next occurrence, or click Change All to change all occurrences. Click Done when you are finished with the search and replace.**



To search and replace formatting only — regardless of the text to which it is applied — leave the Find What and Change To fields blank.

Changing special characters



InDesign CS3 also lets you replace special characters (glyphs) through a separate Glyph pane in the Find/Change dialog box. This makes it easier to actually enter the desired characters. The process is mostly straightforward (just ignore the parts of the pane not described below):

- 1. In the Find Glyph section, choose the font of the desired character in the Font Family pop-up menu, and its style in the Font Style pop-up menu.**
- 2. To choose the character itself, click the unnamed pop-up menu to the right of the Glyph field.**

You'll get a dialog box that mimics the Glyphs panel (see Chapter 16); choose the character from the panel by double-clicking it.
- 3. Repeat steps 1 and 2 using the controls in the Change Glyph section to select the replacement glyph.**
- 4. Set the scope of your search using the Search pop-up menu and the Include Locked Layers, Include Locked Stories, Include Hidden Layers, Include Master Pages, and Include Footnotes buttons, as described earlier in this chapter.**
- 5. Execute the search and/or replace using the Find, Change, Change All, and Change/Find buttons as described earlier in this chapter.**
- 6. Click Done when done.**

If you want to quickly wipe out the selected glyphs, click the Clear Glyphs button.

Working with saved queries



If you plan to do the same search and/or replace operation repeatedly, you can now save queries in InDesign CS3. After entering the find and search information, click the Save Query iconic button, enter a name in the Save Query dialog box that appears, and click OK. That query will now appear in the Query pop-up menu in the Find/Change dialog box.

To run a saved query, just choose it from the Query pop-up menu. To delete a saved query, choose it from the Query pop-up menu and then click Delete Query iconic button.

That's all there is to it!

Checking Spelling

The spell-check feature not only helps you eradicate spelling errors, but it also catches repeated words, as well as words with odd capitalization such as internal capitalization (called *intercaps*). InDesign also flags words not found in the spelling dictionary. You can customize the spelling dictionary, and you can purchase additional spelling dictionaries.

Checking spelling as you type

You can have InDesign check your spelling as you type by simply choosing Edit⇨Spelling⇨Dynamic Spelling. If that menu option is checked, your spelling will be checked as you type, as will the spelling of any text already in the document. Suspected errors are highlighted with red squiggle underlining, so that you can correct them as needed. If you want InDesign to suggest proper spelling, you'll need to use the Check Spelling dialog box, covered in the next section.

Correcting mistakes on the fly

If you use a word processor, chances are it is one that corrects mistakes as you type. Microsoft Word, for example, has a feature called AutoCorrect that lets you specify corrections to be made as you type, whether those be common typos you make or the expansion of abbreviations to their full words (such as having Word replace *tq* with *thank you*).

InDesign offers much of the same functionality, which it calls *Autocorrect*. Unlike Word, you cannot use this feature to replace symbols, such as having InDesign convert (*R*) to the (*r*) symbol as you type. Note that — like Word — Autocorrect works only for text entered in InDesign after Autocorrect is turned on; it will not correct imported or previously typed text.

You enable Autocorrect in the Autocorrect pane of the Preferences dialog box (choose InDesign⇨Preferences⇨Autocorrect or press ⌘+K on the Mac, or choose Edit⇨Preferences⇨Autocorrect or press Ctrl+K in Windows). If you want InDesign to automatically fix capitalization errors, check the Autocorrect Capitalization Errors check box. Typically, this finds typos involving capitalizing the second letter of a word in addition to the first. For example, InDesign would replace *FOrmat* with *Format*.

To add your own custom corrections, click the Add button. This opens the Add to Autocorrect List dialog box, where you can enter the typo text or code that you want InDesign to be alert for in the Misspelled Word field, as well as the corrected or expanded text you want InDesign to substitute in the Correction field.

Using the Check Spelling dialog box

The Check Spelling dialog box not only lets you choose what part of the document to spell check, but it also provides suggestions on correct spelling. Plus, you can use the dialog box to add correctly spelled words to InDesign's spelling dictionary. Even if you use the new dynamic spell-checking feature, you'll still want to do a final spell-checking pass with the Check Spelling dialog box.

Specifying the text to check is a two-step process: First set up the spell check's scope in the document, and then specify the scope in the Search menu.

To set up the scope for the spell check, highlight text, click in a story to check from the cursor forward, select a frame containing a story, or open multiple documents.

Next, open the Check Spelling dialog box (Edit⇨Spelling⇨Check Spelling, or ⌘+I or Ctrl+I) and choose an option from the Search pop-up menu: Document, All Documents, Story, To End of Story, and Selection. Figure 13-4 shows the dialog box. You may not see all the options in the Search pop-up menu; the list of options depends on how you set up the scope. For example, if you didn't highlight text, the Selection option will not be available. However, you can change the scope setup in the document while the Check Spelling dialog box is open — for example, you can open additional documents to check.

Figure 13-4: In the Check Spelling dialog box, use the Search pop-up menu to specify which text to spell-check.



When you first open the Check Spelling dialog box, if text is selected or the text cursor is active, it immediately begins checking the spelling, going to the first suspect word.

Otherwise, the dialog box displays “Ready to Check Spelling” at the top. To begin checking the text, click Start.



You can adjust the scope of the spell-check by using the Search pop-up menu and choosing All Documents, Document, Story, and To End of Story. You can also make the spell-check case-sensitive by checking the Case Sensitive check box.

When the spell checker encounters a word without a match in the dictionary or a possible capitalization problem, the dialog box displays “Not in Dictionary” at the top and shows the word. When the spell checker encounters a duplicate word, such as *of of*, the dialog box displays “Duplicate Word” and shows which word is duplicated. Use the buttons along the right side of the dialog box to handle flagged words as follows:

- ✓ Click the Skip button (this appears only after the spell-check has started) to leave the current instance of a Not in Dictionary word or Duplicate Word unchanged. To leave all instances of the same problem unchanged, click the Ignore All button.
- ✓ To change the spelling of a Not in Dictionary word, click a word in the Suggested Corrections list or edit the spelling or capitalization in the Change To field. To make the change, click the Change button.
- ✓ To correct an instance of a Duplicate Word, edit the text in the Change To field, and then click the Change button.
- ✓ To change all occurrences of a Not in Dictionary word or a Duplicate Word to the information in the Change To field, click the Change All button.
- ✓ To add a word flagged as incorrect — but that you know is correct — to InDesign’s spelling dictionary, click the Add button. (If you have multiple dictionaries, first choose the dictionary to add it to using the Add To pop-up menu.)
- ✓ To add a word flagged as incorrect to a specific dictionary, click the Dictionary button. A Dictionary dialog box appears, which lets you choose the dictionary to which you want to add the word, as well as what language to associate it with.
- ✓ After you’ve finished checking spelling, click the Done button to close the Check Spelling dialog box.

Changing the spelling and hyphenation dictionaries

The spelling dictionary that comes with InDesign is pretty extensive, but it’s very likely that you will need to add words to it. For example, your company might use words that are company-specific terms. Or you might use some product or individuals’ names that would not typically be found in the dictionary. Additionally, you might have some words that you prefer not to hyphenate, others that you want to hyphenate in a specific manner. To address these

issues, you can customize InDesign's spelling and hyphenation dictionaries. InDesign handles both spelling and hyphenation in one dictionary for each language, so you use the same controls to modify both spelling and hyphenation.

Changes made to a dictionary file are saved only in the dictionary file, not with an open document. So if you add words to the English: USA dictionary, the modified dictionary is used for spell checking and hyphenating all text in documents that use the English: USA dictionary.



If you're in a workgroup, be sure to share the edited dictionary file so that everyone is using the same spelling and hyphenation settings. (The file is located in the Dictionaries folder inside the Plug-ins folder inside your InDesign folder.) You can copy it for other users, who must then restart InDesign or press Option+⌘+/ or Ctrl+Alt+/ to reflow the text according to the new dictionary's hyphenation.

Customizing the spelling dictionary

When you add a word to the spelling dictionary, this word will no longer be flagged when you check spelling, and you can be sure that when it's used, it is spelled as it is in the dictionary.

When you add words to the dictionary, you can specify their capitalization. For example, InDesign's dictionary prefers *E-mail*. You can add *e-mail* if you prefer a lowercase *e* or *email* if you prefer to skip the hyphen. To add words to the dictionary, follow these steps:

- 1. Choose Edit⇨Spelling⇨Dictionary.**

The Dictionary dialog box, shown in Figure 13-5, appears.

- 2. Choose whether the addition to the dictionary affects just this document or all documents.**

The Target pop-up menu lists the current document name as well as the name of the user dictionary.

- 3. Choose the dictionary that you want to edit from the Language pop-up menu.**

- 4. Type or paste a word in the Word field.**

The word can have capital letters if appropriate, and it can include special characters such as accents and hyphens.

- 5. To have the added word accepted as being spelled correctly only with the capitalization specified in the Word field, check the Case Sensitive check box.**

- 6. To edit the hyphenation of the word, click the Hyphenate button.**

I cover hyphenation in the next section.

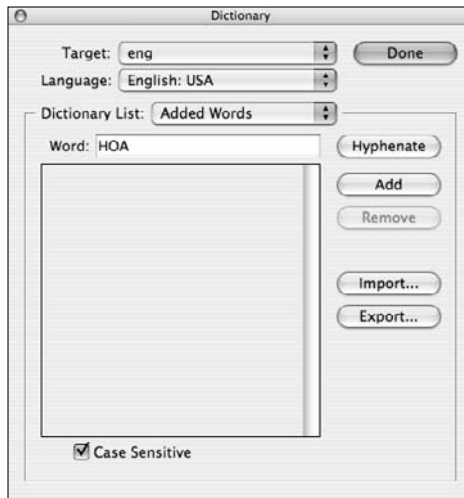
- 7. Click the Add button.**

8. To import a word list or export one for other users to import into their copies of InDesign, click the Import or Export button.

You will then navigate to a folder and choose a filename in a dialog box. Note that when you click the Export button, InDesign will export all selected words from the list. If no words are selected, it will export all the words in the list.

9. When you're finished adding words, click the Done button.

Figure 13-5: Use the Dictionary dialog box to add words to the spelling dictionary and to customize how words are hyphenated.



To delete a word that you added to the dictionary, select it in the list and click the Remove button. To change the spelling of a word you added, delete it and then re-add it with the correct spelling. You can see all deleted words — just those deleted since you opened the dialog box — by selecting Removed Words from the Dictionary List pop-up menu, so you can add back any deleted by error.

Customizing hyphenation points

People can be particular about how to hyphenate words. Fortunately, InDesign lets you modify the hyphenation dictionary by specifying new, hierarchical hyphenation points.

Follow these steps to specify hyphenation points:

1. Choose **Edit** ⇨ **Spelling** ⇨ **Dictionary**.
2. In the **Language** pop-up menu, pick the dictionary that you want to edit.
3. Type or paste the word in the **Word** field; you can also double-click a word in the list.

- 4. To see InDesign's suggestions for hyphenating the word, click the Hyphenate button.**

If you want to change the hyphenation, continue on to Step 5.

- 5. Type a tilde (~, obtained by pressing Shift+~, the open single keyboard quote at the upper left of the keyboard) at your first preference for a hyphenation point in the word.**

If you don't want the word to hyphenate at all, type a tilde in front of it.

- 6. To indicate an order of preference, use two tildes for your second choice, three tildes for your third choice, and so on.** InDesign will first try to hyphenate your top preferences (single tildes), and then it will try your second choices if the first ones don't work out, and so on.

- 7. Click the Add button.**

- 8. Continue to add words until you're finished, and then click the Done button.**

To revert a word to the default hyphenation, select it in the list and click the Remove button. To change the hyphenation, double-click a word in the list to enter it in the Word field, change the tildes, and then click the Add button. When you're adding variations of words, you can double-click a word in the list to place it in the Word field as a starting place.

Chapter 14

The Styles of Text

In This Chapter

- ▶ What styles are
 - ▶ Creating styles
 - ▶ Using nested styles
 - ▶ Managing styles
 - ▶ Applying styles
-

It's the dirty secret of desktop publishing: Most users avoid using styles, even though they know they should. Instead, they apply formatting locally to text, hoping it's the same as a few pages back. It's a lot like not eating your vegetables — even though we know that they're good for us (and they even taste good), it's easier to get something already made, never mind what's in it.

So, I'm going to tell you about styles before I get to the other ways to format text. Styles really are good for you: They will save you lots of work, help you avoid embarrassingly inconsistent formatting, and give you more time to indulge in the guilty pleasure of local formatting.

A *style* is a simple but powerful concept: It's a collection of formatting attributes that you can apply to text all at once, saving you time. Even better, if you change the style, all text that uses it is automatically updated, saving you time *and* ensuring consistency. That's got to be appealing!

I cover the particulars of paragraph and character formatting in Chapters 15 and 16, respectively. The formats themselves are the same whether you apply them directly (locally) or through a style (globally). I cover table styles and cell styles in Chapter 20 and object styles in Chapter 10, although the basic creation and management methods are the same for all styles.



Text in your layout may already have styles applied, using styles defined in Microsoft Word, as explained in Chapter 12.



If you have a smallish monitor, set at 1024 by 768 pixels — the norm for a 17-inch display — the Character Styles and Paragraph Styles panels are shoved to the bottom of the panel dock, and, when they're selected, the only thing you'll see is their panel tab and flyout menu icon. You have a few choices: Shorten other panel groups in the dock to make room for them, remove other panel groups to make room for them, or drag them out of the dock and make them floating.

Creating Styles

InDesign gives you two kinds of styles for text: paragraph and character. Paragraph styles apply formatting to entire paragraphs, while character styles apply formatting to text selections. Unless you're doing a one-page ad, the formatting of which won't be repeated, you should have paragraph styles for all different types of paragraphs in your layout. You would also have character styles for places where you consistently want to override your paragraph styles, such as for the lead-in of a bulleted paragraph that might have the first few words in a different font or color.

Whether you're creating styles for paragraphs or characters, the basic process is the same.

The easiest way is to format your text using the Paragraph and Character panels, as described in Chapters 15 and 16, and then make sure you've selected the text you want to use as the model for your new style. Next, create the appropriate type of new style:

- ✓ For paragraph styles, open the Paragraph Styles panel by choosing **Type**→**Paragraph Styles** or pressing **⌘+F11** or **Ctrl+F11**. Then choose **New Paragraph Style** from the flyout menu to open the **New Paragraph Style** dialog box shown in Figure 14-1.
- ✓ For character styles, open the Character Styles panel by choosing **Type**→**Character Styles** or pressing **Shift+⌘+F11** or **Ctrl+Shift+F11**. Then choose **New Character Style** from the flyout menu to open the **New Character Style** dialog box shown in Figure 14-2.



The shortcut for accessing the Paragraph Styles panel has changed to **⌘+F11** or **Ctrl+F11** in InDesign CS3 from just **F11** in previous versions. Similarly, the shortcut for the Character Styles has changed to **Shift+⌘+F11** or **Ctrl+Shift+F11** from the previous **Shift+F11**. But the old shortcuts continue to work, though they may interfere with Mac OS X's Exposé software.

Figure 14-1:
The New Paragraph Style dialog box's General pane.

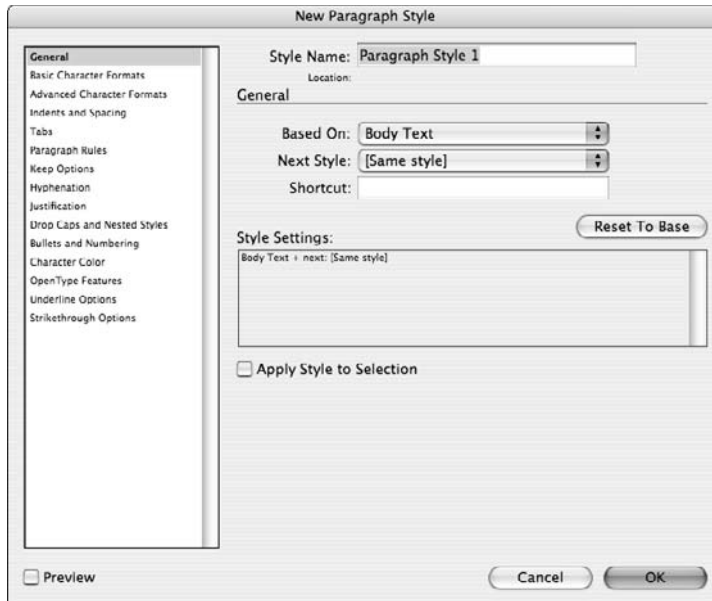
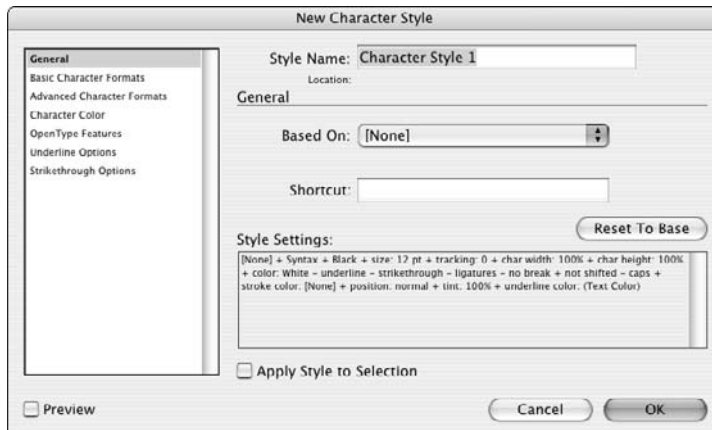


Figure 14-2:
The New Character Style dialog box's General pane.



In both cases, the style will pick up the selected text's formatting. Adjust the style further if desired, give the style a name using the Style Name field in the General pane, and then click OK.

Of course, you can specify all the formatting directly in the new-style dialog boxes rather than having InDesign pick it up from existing text. Create the new styles as just described, and then go through each of the panes (selecting each from the list at the left of the dialog box) and choose your settings.

In the General pane of the New Paragraph Style and New Character Style dialog boxes, there are several controls that make styles work more intelligently:

- ✓ The Based On pop-up menu displays the names of other styles. You use this feature to create families of styles. Thus, if you change a style that other styles are based on, all those styles are updated with the new settings.
- ✓ In the Shortcut field, hold down any combination of ⌘, Option, and Shift, or Ctrl, Alt, and Shift, and press any number on the keypad. (Letters and non-keypad numbers cannot be used for keyboard shortcuts. And Windows users need to make sure that Num Lock is on.)
- ✓ If you want to apply a new style to text that is selected, be sure to check the Apply Style to Selection check box before clicking OK to save the new style.



InDesign comes with a predefined default paragraph style called [Basic Paragraph] that text in a new frame automatically has applied to it. You can edit [Basic Paragraph] like any other style. Similarly, there's a predefined character style called [Basic Character].

There are several things to keep in mind when creating paragraph styles. (Character styles are pretty straightforward, so I'm not presenting a similar list for them.)

- ✓ To have InDesign automatically apply a different style to the next paragraph when you type in text, choose a style name from the Next Style pop-up menu while defining a style. For example, when you define a style named *Headline*, you might choose *Byline* as the next style, so after you type in a headline, the next paragraph will be formatted for a byline. Obviously, you need to have the *Byline* style available.
- ✓ If you want your paragraph style to use a character style, you must define that character style first. (Drop caps and nested styles use character styles.)

A special function available to paragraph styles is something called a *nested style*. Basically, a nested style is a way of applying a series of character styles within a paragraph style based on a set of parameters you specify. For example, in a numbered list, you might want one character style applied to the numeral, and another to the first sentence, and then have the paragraph

style's text formatting applied to the rest of the paragraph. With nested styles, you build all that into the paragraph style and let InDesign do the heavy lifting. Here's how it works:

1. Define any character styles that you'll apply to text through a nested style.

Even if all you're doing is making text italic, you need to define a character style to do so. The Nested Styles feature cannot apply any attributes other than those available in a character style.

2. Open the Paragraph panel (Type⇧Paragraph Styles, or ⌘+F11 or Ctrl+F11), choose Style Options from the flyout menu to open the Paragraph Style Options dialog box, and go to the Drop Caps and Nested Styles pane.

3. Click New Nested Style.

An entry appears in the Nested Styles section of the dialog box. This is what will be applied to text.

4. Click the style name in the Nested Styles section of the pane to choose from an existing character style.

When you click the style name, a list of other styles appears, including [None], which uses the paragraph style's default formatting.

You also have the [Repeat] option, which, if selected, lets you repeat a sequence of previous styles (you choose the number in the third column).

5. Click in the second column to determine the scope end point.

Your choices are Through or Up To. For example, if you choose Through for a nested style that is set for four words, all four words will get the nested style. If you choose Up To, the first three words will get the style and the fourth will not.

6. In the third column, specify how many items you want InDesign to count in determining the scope's end point.

For example, if you want to have the first seven characters have the style applied, choose 7. If you want to have the style applied up to the first tab, choose 1.

7. Click the item in the fourth column to specify the scope of text to which you're applying the nested styles.

Figure 14-3 shows the options. They break into three groups: a number of items (characters, words, and so on), a specific character (tab, em space, and so on), and a specific marker character (inline graphic marker, auto page number, and section marker). Whatever you choose needs to be consistent in all your text because InDesign will follow these rules slavishly.



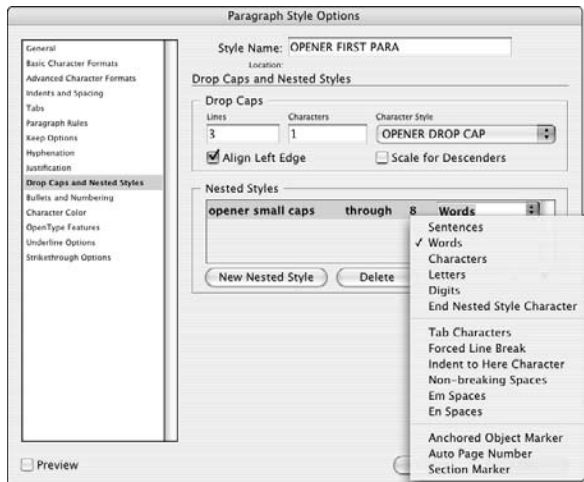
8. Create multiple nested styles in one paragraph with different rules for each.

Obviously, you may not need to do this, but the option exists. InDesign applies the styles in the order in which they appear in the dialog box, and each starts where the other ends. Use the up and down arrow buttons to change the order of nested styles.

9. Select the Preview option to preview the formatting if you selected sample text before opening the dialog box.

10. Click OK when you're done.

Figure 14-3: You can use a nested style to, for example, set the first two words in a paragraph (in this case, the eight that follow the drop cap) as small caps.



Managing Styles

InDesign provides lots of ways to manage your styles. In this section, I cover the common ones. Note that the options described here also apply to object styles, table styles, and cell styles — so, for example, the Load Paragraph Styles menu option will have a counterpart in the Object Styles, Table Styles, and Cell Styles panels' flyout menus.

Updating styles

If you've already created a style and want to change it, just go to the appropriate styles panel and choose Style Options from its flyout menu. If you've selected text that has the formatting you want the style to use in place of its current formatting, just choose Redefine Style from the flyout menu. Remember that all text using the style will be automatically be updated when the style changes.

What's that Quick Apply panel?

Another way to apply paragraph and character styles (and object styles, scripts, menu commands, and other elements) is by using the Quick Apply feature. Quick Apply is a consolidated list of styles that you access by choosing Edit⇨Quick Apply, by clicking the Quick Apply iconic button (the lightning-bolt icon) in many panels, or by pressing ⌘+Return or Ctrl+Enter.

If you have selected text or have the text-insertion point active, the Quick Apply panel presents all stored formatting attributes available. You can scroll down to the one you want, or you can type the first few letters of the style name in the text field at the top to jump to styles beginning with those letters and then navigate to the one you want. Then press Return or Enter, which brings you back to where you were working with your text. Pressing ⌘+Return or Ctrl+Enter again closes the Quick Apply panel.

For users who are working on layouts from their keyboards — perhaps a layout artist who's working on a notebook while commuting — Quick Apply can be handy because you can switch to it, apply the style, and return to your text without touching the mouse.

InDesign CS3 adds a lot more attributes to the Quick Apply panel, so it can quickly get overwhelming. (InDesign CS2 just had styles in this panel.) To remove attributes you likely will never use in this panel — such as scripts and menu customizations — choose the unnamed pop-up menu at the top of the panel, and deselect unwanted attributes (the check marks indicate attributes that *will* display). (You can also choose what attributes display in the Quick Apply panel by choosing Customize from its flyout menu.)

Sharing styles with others

The Load Paragraph Styles or Load Character Styles menu option (based on which styles panel is open) and the Load All Text Styles menu option let you import styles from another InDesign document. (Load All Text Styles imports paragraph and character styles at the same time.) You will get a dialog box listing the styles in the chosen document, so you can decide which ones to import.

If you import styles whose names match those in the current document, InDesign gives you a chance to let the imported style overwrite the current style or to leave the current style as is and give the imported style a new name. If there is an entry in the Conflict with Existing Style, you can click that entry for a pop-up menu that provides two choices: Auto-Rename and Use Incoming Style Definition. Figure 14-4 shows this Load Styles dialog box.

Note that at the bottom of the dialog box is the Incoming Style Definitions window, which lists the style definitions to help you decide which to import, as well as which to overwrite or rename.

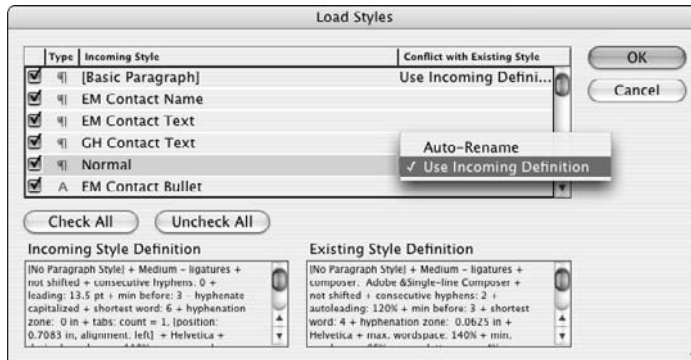


Figure 14-4:
The Load
Styles
dialog box.

Using style groups



To help you find the desired style in documents that have dozens of them, InDesign lets you create style groups, which create a folder in the styles panel's style list that you can open and close as desired. To create a group, choose New Style Group from the panel's flyout menu or click the Create New Style Group iconic button (folder icon) on the bottom of the panel. Enter a name in the dialog box that appears and click OK.

When working with style groups (which have a folder icon to the left of their names in the panel list), you have several options to add styles:

- ✓ You can drag any desired styles into the group.
- ✓ You can copy a selected style to the group by choosing Copy to Group and then selecting the target group in the dialog box that appears.
- ✓ If multiple styles are selected, you can create a group and move them into it in one fell swoop by choosing New Group from Styles in the flyout menu. (Note that this option is grayed out if any of the predefined styles — [None] and either [Basic Paragraph] or [Basic Character] — are selected.)



To quickly open all groups, choose Open All Groups in the panel's flyout menu. To quickly close them all, choose Close All Groups.

Other management options

The styles panels' flyout menus have several other options to manage your styles:

- ✓ Duplicate Style copies the currently selected style, so you can work on the copy.
- ✓ Delete Style — no surprise! — deletes selected styles.

- ✔ Select All Unused selects all styles not used in the document, so you can delete them all at once with the Delete Style menu option — part of keeping your document neat and tidy.
- ✔ Sort by Name alphabetizes the list of style names. (You can change the order of style names by dragging them within the list.)

Applying Styles

There are some subtle differences between applying paragraph styles and character styles, so I'll cover those particulars a little later in this section. But two techniques work the same for both types of style:

- ✔ If your text selection uses more than one paragraph style or more than one character style, the styles panel will display the text (Mixed) at the upper left to let you know that.
- ✔ InDesign has a neat new capability that lets you apply multiple styles at once to selected text. First, define the various styles, and be sure that each style has a different style selected in the Next Style pop-up menu in the Paragraph Style Options or New Paragraph Style dialog boxes. For example, if you have Headline, Byline, and Body Copy styles, make sure that Headline has Byline selected in Next Style and that Byline has Body Copy selected in Next Style. Then highlight *all* the text that uses this sequence of styles. Now Control+click or right-click Headline and select Apply "Headline" Then Next Style from the contextual menu. InDesign applies Headline to the first paragraph, Byline to the second paragraph, and Body Copy to the rest.

Paragraph particulars

To apply a paragraph style, just click within a paragraph or highlight text in a range of paragraphs and then click the style name in the Paragraph Styles panel or press its keyboard shortcut. (Windows users must make sure Num Lock is on when using shortcuts for styles.)

When you apply a style to selected paragraphs, all local formats and applied character styles are retained. All other formats are replaced by those of the applied style. If you want to override those attributes, choose Clear Overrides from the Paragraph Styles panel's flyout menu or hold the Option or Alt key when clicking the style name in the panel.

If you want to remove a style from a paragraph, so it's not changed if the style is later changed, choose Break Link to Style from the flyout menu. The upper left of the panel will display the text (No Style).

Character characteristics

To apply a character style, just highlight text and then click the style name in the Character Styles panel or press its keyboard shortcut. (Windows users must make sure Num Lock is on when using shortcuts for styles.)

If you want to remove a style from a text selection so that it's not changed if the character style is later changed, choose Break Link to Style from the flyout menu or simply apply the [None] style. Note that if you later apply a paragraph style to text with [None] character style, the text will take on the paragraph style's formatting rather than retaining its local formatting.

Chapter 15

Fine-Tuning Paragraph Details

In This Chapter

- ▶ Understanding paragraph fundamentals
- ▶ Changing basic and advanced paragraph formats
- ▶ Applying bullets and numbering
- ▶ Working with hyphenation and justification
- ▶ Adding ruling lines to paragraphs

Paragraphs are more than lines of text; they are chunks of information that themselves help convey meaning by organizing that information into related bits. Various types of paragraph formatting let you both make those chunks clearly distinguishable from each other and highlight certain chunks, such as lists or long quotes, from others.

This chapter explains what you need to know about formatting paragraphs, from setting indents and alignment — the two most commonly used paragraph attributes.

Applying Paragraph Formats

InDesign provides three ways to apply paragraph formats:

- ✔ Use the controls in the Paragraph panel, shown in Figure 15-1, or their keyboard shortcuts. This method is great for working on individual paragraphs, although it's not the best method when working with lots of paragraphs you want to have the same formatting. There are three ways to open the Paragraph panel: Choose **Type**⇨**Paragraph**, choose **Window**⇨**Type & Tables**⇨**Paragraph**, or press **Option+⌘+T** or **Ctrl+Alt+T**.
- ✔ Use the controls in the Control panel (be sure that the Type tool is active and that the ¶ iconic button is selected in the panel to display paragraph-oriented functions). These controls mirror those in the

Paragraph panel, and using them instead of the Paragraph panel can reduce screen clutter. If the Control panel is not visible (it almost always is), display it by choosing Window⇨Control or pressing Option+⌘+6 or Ctrl+Alt+6.

- ✓ Create and apply paragraph styles, as covered in Chapter 14. Paragraph styles let you apply consistent formatting — and easily change it to all affected paragraphs — throughout your document.

Whichever method you use — and you'll use them all — the types of formatting available to you are the same.



The Paragraph panel and Control panel provide access to most of InDesign's paragraph-formatting options. Also, several of the options have keyboard shortcuts, as shown in the menus. But to set tabs, you must open the Tabs panel, as covered in Chapter 20.

Figure 15-1 shows the Paragraph panel. If you choose Hide Options from the flyout menu, the Space Before, Space After, Drop Cap Number of Lines, Drop Cap Number of Characters, Hyphenate, and Align/Do Not Align to Baseline Grid controls are not displayed. You can use the double-arrow iconic button to the left of the panel name to toggle among showing the panel title, the basic options, and all options.

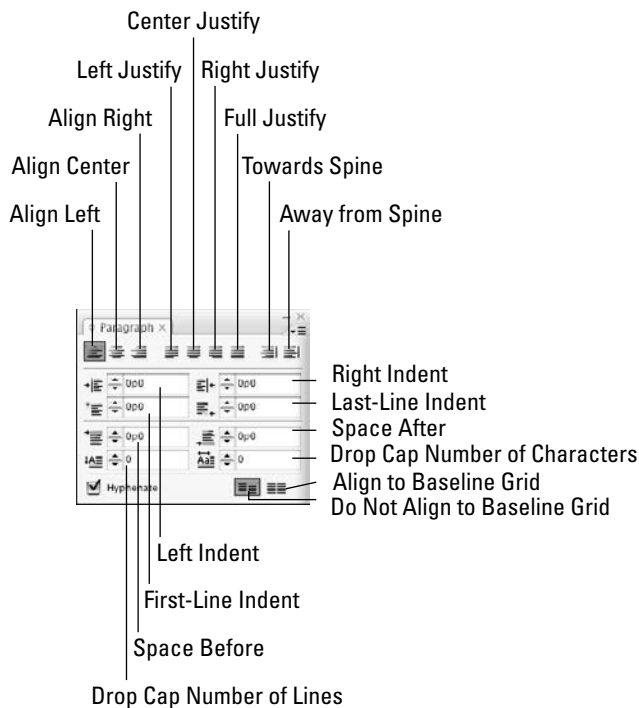


Figure 15-1:
The full
Paragraph
panel.



If you have a smallish monitor, set at 1024 by 768 pixels — the norm for a 17-inch display — the Paragraph and Paragraph Styles panels are shoved to the bottom of the panel dock, and, when they're selected, the only thing you'll see is their panel tab and flyout menu icon. You have a few choices: Shorten other panel groups in the dock to make room for them, remove other panel groups to make room for them, or drag them out of the dock and make them floating.

Specifying Alignment and Indents

Alignment and indents give paragraphs their fundamental appearance. Indentation helps readers visually separate paragraphs — the indent acts as the separator, like the blank lines used to separate paragraphs in typewritten documents — while alignment provides visual texture.

Controlling alignment

The alignment buttons at the top of the Paragraph panel control how a selected paragraph begins and ends relative to the left and right margins. To apply a paragraph alignment to selected paragraphs, click one of the buttons. You can also use the keyboard shortcuts described in the following list. Here's a description of each alignment option (the icons themselves illustrate what they do):

- ✓ **Align Left** (Shift+⌘+L or Ctrl+Shift+L): This alignment places the left edge of every line at the left margin (the margin can be the frame edge, frame inset, left indent, or column edge) and fits as many words (or syllables, if the hyphenation is turned on) on the line as possible. In left-aligned paragraphs, the right margin is said to be *ragged* because the leftover space at the right end of each line differs from line to line and produces a ragged edge.
- ✓ **Align Center** (Shift+⌘+C or Ctrl+Shift+C): This alignment makes both the left and right edges of the paragraphs equally ragged.
- ✓ **Align Right** (Shift+⌘+R or Ctrl+Shift+R): This is a mirror opposite of Align Left. The right edge is straight; the left edge is ragged.
- ✓ **Justify, Last Line Aligned Left** (Shift+⌘+J or Ctrl+Shift+J): In justified text, the left and right ends of each line are flush with the margins. (There's more about justification later in this chapter.) Justified text is nearly always hyphenated — if you don't hyphenate justified text, spacing between letters and words is very inconsistent. Aligning the last line flush left is the traditional way of ending a paragraph.



- ✓ **Justify, Last Line Aligned Center:** This produces justified text with the last line centered.
- ✓ **Justify, Last Line Aligned Right:** This produces justified text with the last line aligned to the right.
- ✓ **Justify All Lines** (Shift+⌘+F or Ctrl+Shift+F): This produces justified text with the last line forcibly justified. This option can produce last lines that are very widely spaced. The fewer the number of characters on the last line, the greater the spacing.

The previous three alignment options are rarely used, and for good reason. People expect justified text to have the last line aligned left; the space at the end of the line marks the end of the paragraph. By changing the position of that last line, you can confuse your reader.

- ✓ **Align Toward Spine:** Essentially, this option automatically creates right-aligned text on left-hand pages and left-aligned text on right-hand pages. InDesign chooses a left or right alignment based on the location of the spine in a facing-pages document.
- ✓ **Align Away from Spine:** This option is the same as Align Toward Spine except that the alignment is reversed: Text aligns to the left on left-hand pages and to the right on right-hand pages.



When creating paragraph styles, all the above controls are available in the Indents and Spacing pane of the New Paragraph Styles dialog box.

Adjusting indent controls

The indent controls in the Paragraph panel let you both move the edges of paragraphs away from the left and/or right margins and indent the first line.

Your options are as follows:

- ✓ **Left Indent:** Moves the left edge of selected paragraphs away from the left margin by the amount you specify in the field. You can also click the up and down arrows. Each click increases the value by 1 point; holding down the Shift while clicking increases the increment to 1 pica.
- ✓ **Right Indent:** Moves the right edge of selected paragraphs away from the right margin by the amount you specify in the field. You can also use the up and down arrows.
- ✓ **First-Line Left Indent:** Moves the left edge of the first line of selected paragraphs away from the left margin by the amount you specify in the field. You can also click the up and down arrows to adjust the indentation. The value in the First-Line Left Indent field is added to any Left Indent value. Using a tab or spaces to indent the first line of a paragraph, which is what was done in the age of typewriters, is usually *not* a good idea. You're better off specifying a First-Line Left Indent.

- ✓ **Last-Line Right Indent:** Moves the right edge of the last line of selected paragraphs away from the right margin by the amount you specify in the field. You can also click the up and down arrows.



When creating paragraph styles, all the above controls are available in the Indents and Spacing pane of the New Paragraph Styles dialog box.

Inserting space between paragraphs

To format a lengthy chunk of text with multiple paragraphs, you can indicate a new paragraph by indenting the paragraph's first line (by specifying a First-Line Left Indent value, as covered earlier). Or you can insert some extra space between the new paragraph and the preceding one. Although no rule states that you can't use both of these spacing methods, it's a good idea to use one or the other — not both:

- ✓ To insert space before selected paragraphs, enter a value in the Space Before field in the Paragraph panel or Control panel. You can also use the up and down arrow buttons; each click increases the value by 1 point and holding down Shift key increases the increment to 1 pica.
- ✓ The Space After field works the same as the Space Before field but inserts space below selected paragraphs. If you use Space Before to space paragraphs, you won't need to use Space After, and vice versa; combining both can be confusing.



What you don't want to do is insert extra paragraph returns between paragraphs. Doing so makes it harder to ensure that columns begin with text (as opposed to blank lines).

Controlling space between lines

Leading (pronounced “ledding”) is the space between lines of text *within* a paragraph. Even though leading is traditionally an attribute of the paragraph, InDesign treats it as a character format, which you specify by using the Leading control in the Character panel or Control panel.



To change this character-oriented approach to affect entire paragraphs, select the Apply Leading to Entire Paragraphs option in the Type pane of the Preferences dialog box (choose InDesign⇨Preferences⇨Type or press ⌘+K on the Mac, or choose Edit⇨Preferences⇨Type or press Ctrl+K in Windows).

Another way to control space between lines of text is to use baseline grids, as described in Chapter 11. Essentially, a baseline grid overrides the leading specified for paragraphs — you choose whether it overrides the spacing of every line in the paragraph or just the first line. To align to baseline grids,

you must click the Align to Baseline iconic button in the Paragraph panel (the rightmost iconic button on the bottom of the panel) for the selected paragraphs. To prevent such locking to the baseline, click the Do Not Align to Baseline iconic button to its immediate left. These same buttons also exist on the right side of the Control panel.

Controlling where paragraphs break

InDesign's Keep Options feature lets you prevent widows and orphans; it also lets you keep paragraphs together when they would otherwise be broken at the bottom of a column. A *widow* is the last line of a paragraph that falls at the top of a column. (The poor thing has been cut off from the rest of the family, the last survivor.) An orphan is the first line of a paragraph that falls at the bottom of a column. (It, too, has become separated from its family, the only survivor.)

When you choose Keep Options from the Paragraph panel's flyout menu, the Keep Options dialog box, shown in Figure 15-2, is displayed.

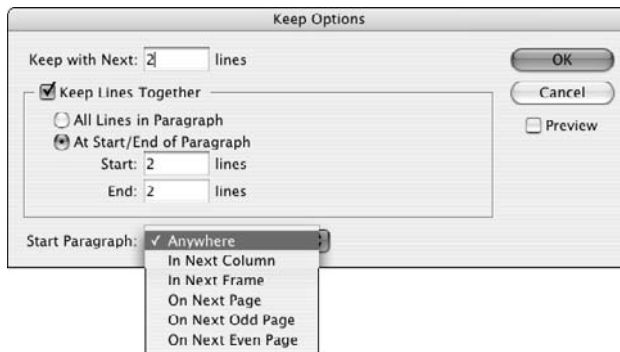


Figure 15-2:
The Keep
Options
dialog box.

The Keep Options dialog box holds several options for how paragraphs are managed as text breaks across columns and pages:

- ✓ **Keep with Next Lines:** This option applies to two consecutive paragraphs and controls the number of lines of the second paragraph that must stay with the first paragraph if a column or page break occurs within the second paragraph.
- ✓ **Keep Lines Together:** If you click this check box, it will prevent paragraphs from breaking. When this box is checked, the two radio buttons below it become available. The radio buttons present an either/or choice. One must be selected; At Start/End of Paragraph is selected by default.

- ✓ **All Lines in Paragraph:** This option prevents a paragraph from being broken at the end of a column or page. When a column or page break occurs within a paragraph to which this setting has been applied, the entire paragraph moves to the next column or page.
- ✓ **At Start/End of Paragraph:** Select this check box to control widows and orphans. When this button is selected, the two fields below it become available:
 - **Start x Lines:** This field controls orphans. The value you enter is the minimum number of lines at the beginning of a paragraph that must be placed at the bottom of a column when a paragraph is split by a column ending.
 - **End x Lines:** This field controls widows. The value you enter is the minimum number of lines at the end of a paragraph that must be placed at the top of a column when a paragraph is split by a column ending.
- ✓ **Start Paragraph:** From this pop-up menu, choose Anywhere to let the paragraph begin where it would fall naturally in the sequence of text (no forced break). Choose In Next Column to force a paragraph to begin in the next column; choose In Next Frame to make it begin in the next frame in the story chain; choose On Next Page to force a paragraph to begin on the next page (such as for chapter headings). Your other choices are similar: On Next Odd Page and On Next Even Page.



When creating paragraph styles, all the above controls are available in the Keep Options pane of the New Paragraph Styles dialog box.

Adding Drop Caps

Drop caps are enlarged capital letters that are often used to embellish paragraphs (usually the first paragraph of a chapter or story) and to draw attention to paragraphs. In the Paragraph panel or Control panel, InDesign lets you specify the number of letters you want to include in a drop cap and the number of lines you want to drop them down into.

To add one or more drop caps to selected paragraphs, enter a number in the Drop Cap Number of Characters field in the Paragraph panel or Control panel. The number you enter determines how many characters in a selected paragraph will be made into drop caps. To specify the number of lines a drop cap will extend into a paragraph (and therefore the height of the drop cap), enter a number in the Drop Cap Number of Lines field.

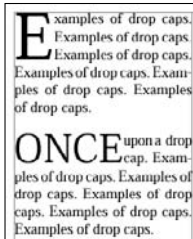
After you create a drop cap, you can modify it by highlighting it and changing any of its character formats — font, size, color, and so on — by using the Character panel or Control panel, as well as other panes such as Stroke and Swatches. Even better: Apply a character style to it that has all the desired attributes stored in one place. Figure 15-3 shows two examples of drop caps.



When creating paragraph styles, the above controls are available in the Drop Caps and Nested Styles pane of the New Paragraph Styles dialog box. (See Chapter 14 for details on nested styles.)

Figure 15-3:

A one-character drop cap three lines deep (top), and a two-line, four-character drop cap with the first word set in small caps (bottom).



Controlling Hyphenation and Justification

Hyphenation is the placement of hyphens between syllables in words that won't fit at the end of a line of text. A hyphen is a signal to the reader that the word continues on the next line. InDesign gives you the option to turn paragraph hyphenation on or off. If you choose to hyphenate, you can customize the settings that determine when and where hyphens are inserted.

Justification is the addition or removal of space between words and/or letters that produces the flush-left/flush-right appearance of justified paragraphs. InDesign's justification controls let you specify how space is added or

removed when paragraphs are justified. If you justify paragraphs, you almost certainly want to hyphenate them, too. If you opt for left-aligned paragraphs, whether to hyphenate is a personal choice.

InDesign offers both manual and automatic hyphenation.

Manual hyphenation

To break a particular word in a specific place, you can place a *discretionary hyphen* in the word. If the word won't entirely fit at the end of a line in a hyphenated paragraph, InDesign will use the discretionary hyphen to split the word if the part of the word before the hyphen fits on the line. To insert a discretionary hyphen, use the shortcut Shift+⌘+- (hyphen) or Ctrl+Shift+- (hyphen) in the text where you want the hyphen to appear.

If a word has a discretionary hyphen, and hyphenation is necessary, InDesign breaks the word *only* at that point. But you can place multiple discretionary hyphens within a single word. If a word needs to be hyphenated, InDesign will use the hyphenation point that produces the best results.



You can prevent a particular word from being hyphenated either by placing a discretionary hyphen in front of the first letter or by highlighting the word and choosing No Break from the flyout menu of the Control panel or Character panel. (You need to select the A iconic button in the Control panel to get this option in its flyout menu.) But be careful: If you select more than a line's width of text and apply No Break, InDesign will not know what to do, and so it won't display the rest of the story.

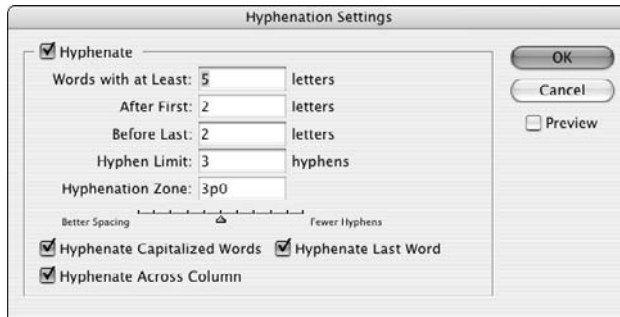
To prevent hyphenation for an entire paragraph, click anywhere inside of it and uncheck Hyphenate from the Paragraph panel or Control panel (be sure the ¶ button is selected in the Control panel).

Automatic hyphenation

To have InDesign automatically hyphenate selected paragraphs, all you have to do is check the Hyphenate check box in the Paragraph panel or Control panel. (A reminder that, in the Paragraph panel, the Hyphenate check box is displayed only if you choose Show Options from the flyout menu.)

You can control how InDesign actually performs the hyphenation via the Hyphenation option in the flyout menu. When you choose Hyphenation, the Hyphenation Settings dialog box, shown in Figure 15-4, appears.

Figure 15-4:
The
Hyphenation
Settings
dialog box.



The options in the Hyphenation Settings dialog box include

- ✔ **Hyphenate:** This is a duplicate of the Hyphenate check box in the Paragraph panel and Control panel. If you didn't check it before opening the Hyphenation Settings dialog box, you can check it here.
- ✔ **Words with at Least *x* Letters:** This is where you specify the number of letters in the shortest word you want to hyphenate.
- ✔ **After First *x* Letters:** In this field, enter the minimum number of characters that can precede a hyphen.
- ✔ **Before Last *x* Letters:** The number entered in this field determines the minimum number of characters that can follow a hyphen.
- ✔ **Hyphen Limit: *x* Hyphens:** In this field, you specify the number of consecutive lines that can be hyphenated. Several consecutive hyphens produce an awkward, ladder-like look, so consider entering a small number, such as **2** or **3**, in this field.
- ✔ **Hyphenation Zone:** The entry in this field applies only to nonjustified text and only when the Adobe Single-Line Composer option is selected (in the Paragraph panel's flyout menu). A hyphenation point must fall within the distance specified in this field in relation to the right margin in order to be used. Acceptable hyphenation points that do not fall within the specified hyphenation zone are ignored. You can also use the Better Spacing/Fewer Hyphens slider below the field to pick a value rather than entering a value in the Hyphenation Zone field.
- ✔ **Hyphenate Capitalized Words:** If you check this box, InDesign will hyphenate, when necessary, capitalized words. If you don't check this box, a capitalized word that would otherwise be hyphenated will get bumped to the next line, which may cause excessive spacing in the previous line.



- ✓ **Hyphenate Last Word:** Check this box to allow InDesign to break the last word in a paragraph. Otherwise, InDesign moves the entire word to the last line and spaces the preceding text as necessary.
- ✓ **Hyphenate Across Column:** Check this box to let text hyphenate at the end of a column.

When creating paragraph styles, all the above controls are available in the Hyphenation pane of the New Paragraph Styles dialog box — except for the composer setting, covered in the next sections.

Controlling justification

To control how justification is achieved, you can

- ✓ Condense or expand the width of spaces between words.
- ✓ Add or remove space between letters.
- ✓ Condense or expand the width of characters.

The options in the Justification dialog box, shown in Figure 15-5, let you specify the degree to which InDesign will adjust normal word spaces, character spacing, and character width to achieve justification. Access this dialog box via the flyout menu in the Control panel or in the Paragraph panel, or by pressing Option+Shift+⌘+J or Ctrl+Alt+Shift+J. When specifying values in the Justification dialog box, Minimum values must be smaller than Desired values, which in turn must be smaller than Maximum values.

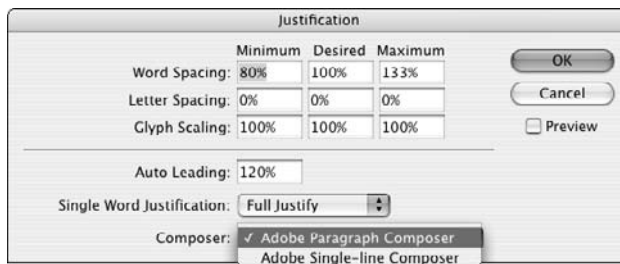


Figure 15-5:
The
Justification
dialog box.

The Justification dialog box lets you specify the following options:

- ✓ **Word Spacing:** Enter the percentage of a character that you want to use whenever possible in the Desired field. (The default value is 100%, which uses a font's built-in width.) Enter the minimum acceptable percentage in the Minimum field; enter the maximum acceptable percentage in the Maximum field. The smallest value you can enter is 0%; the largest is 1000%.

- ✓ **Letter Spacing:** The default value of 0% in this field uses a font's built-in letter spacing. In the Desired field, enter a positive value to add space (in increments of 1% of an en space) between all letter pairs; enter a negative value to remove space. Enter the minimum acceptable percentage in the Minimum field; enter the maximum acceptable percentage in the Maximum field.
- ✓ **Glyph Scaling:** The default value of 100% uses a character's normal width. In the Desired field, enter a positive value to expand all character widths; enter a negative value to condense character widths. Enter the minimum acceptable percentage in the Minimum field and the maximum acceptable percentage in the Maximum field. If you do apply glyph scaling, it's best to keep it to a range of 97 to 103 percent at most.

If you use the Adobe Paragraph Composer option (explained in the following section) for justified paragraphs, specifying a narrow range between minimum and maximum Word Spacing, Letter Spacing, and Glyph Scaling will generally produce good-looking results. However, if you choose the Adobe Single-Line Composer option, a broader range between Minimum and Maximum gives the composer more leeway in spacing words and letters and hyphenating words and can produce better-looking results. The best way to find out what values work best is to experiment with several settings. Print out hard copies and let your eyes decide which values produce the best results.



When creating paragraph styles, all the above controls are available in the Justification pane of the New Paragraph Styles dialog box.

Composing text

The Paragraph panel's flyout menu offers two options for implementing the hyphenation and justification settings you establish: the Adobe Single-Line Composer and the Adobe Paragraph Composer. (These options are also available in the Justification dialog box, covered in the previous section.)

Adobe Single-Line Composer

In single-line composition, hyphenation, and justification settings are applied to each line in a paragraph, one line at a time. The effect of modifying the spacing of one line on the lines above and below it is not considered in single-line composition, so it can cause poor spacing.

Adobe Paragraph Composer

InDesign's Adobe Paragraph Composer is selected by default. It takes a broader approach to composition than the Adobe Single-Line Composer by looking at the entire paragraph at once. If a poorly spaced line can be fixed by adjusting the spacing of a previous line, the Adobe Paragraph Composer will reflow the previous line.

The Adobe Paragraph Composer is more sophisticated than the Single-Line Composer, offering better overall spacing because it will sacrifice optimal spacing a bit on one line to prevent really bad spacing on another, something the single-line method does not do.

Ruling Your Paragraphs

If you want to place a horizontal line within text so that the line moves with the text when editing causes the text to reflow — an often effective highlighting device — you need to create a paragraph rule. A paragraph rule looks much like a line created with the line tool but behaves like a text character. Here's how to create paragraph rules:

1. **Select the paragraphs to which you want to apply a rule above and/or a rule below and then choose Paragraph Rules from the Paragraph panel's or Control panel's flyout menu; alternatively, you can use the shortcut Option+⌘+J or Ctrl+Alt+J.**

You can also specify rules as part of a paragraph style. The Paragraph Rules dialog box, shown in Figure 15-6, is displayed.

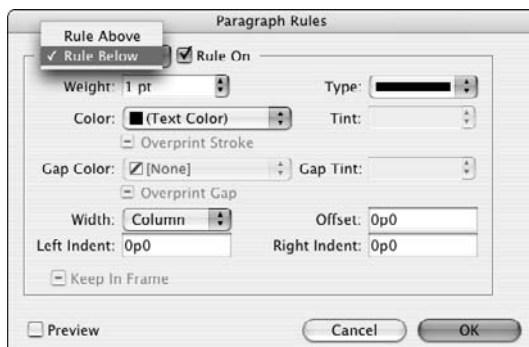


Figure 15-6:
The
Paragraph
Rules
dialog box.

2. **Choose Rule Above or Rule Below and then click Rule On.**

To add rules both above and below, click Rule On for both options and specify their settings separately. To see the rule while you create it, select the Preview option.

3. **Choose a predefined thickness from the Weight pop-up menu or enter a value in the Weight field.**
4. **Choose a rule type from the Type pop-up menu.**

You can choose from 17 types, including dashed, striped, dotted, and wavy lines.

5. **Choose a color for the rule from the Color pop-up menu.** This menu lists the colors displayed in the Swatches panel (Window⇨Swatches or F5).
6. **From the Width pop-up menu, choose Column to have the rule extend from the left edge of the column to the right edge of the column; choose Text to have the rule extend from the left edge of the frame or column to the right.**
7. **To indent the rule from the left and/or right edges, enter values in the Left Indent and/or Right Indent fields.**
8. **Control the vertical position of the rule by entering a value in the Offset field.**

For a rule above, the offset value is measured upward from the baseline of the first line in a paragraph to the bottom of the rule; for a rule below, the offset is measured downward from the baseline of the last line in a paragraph to the top of the rule.

9. **Check the Overprint Stroke box if you want to print a rule on top of any underlying colors.**

This ensures that any misregistration during printing will not result in white areas around the rule where the paper shows through. There's a similar Overprint Gap check box for lines that have a Gap Color.



10. **To ensure that a rule over a paragraph at the top of a frame displays within the frame, check the Keep in Frame option.**
11. **Click OK to close the dialog box, implement your changes, and return to the document.**

To remove a paragraph rule, click in the paragraph to which the rule is applied, choose Paragraph Rules from the Paragraph panel's flyout menu, uncheck the Rule On box, and then click OK.



When creating paragraph styles, all the above controls are available in the Paragraph Rules pane of the New Paragraph Styles dialog box.

Chapter 16

Finessing Character Details

In This Chapter

- ▶ Working with character formats
 - ▶ Changing font families, styles, and sizes
 - ▶ Applying other character formats
 - ▶ Controlling horizontal and vertical spacing
-

When you create documents, you have lots of opportunities to make decisions about how the text appears. With its comprehensive set of character-formatting tools, InDesign lets you change the look of type so it can precisely match the communication needs of your publications. You can control not just the font and size of type, but also many other variations.

Decisions about type matter. A document relies on good typography to allow others to easily read and understand it. The appearance of type supports the message you're conveying, and doing a good job of character formatting is worth your time.

Specifying Character Formats

InDesign lets you modify the appearance of highlighted characters or selected paragraphs with the following options:

- ✓ **Character panel:** Highlight the text and open the Character panel (Type⇨Character, or ⌘+T or Ctrl+T), which is shown in Figure 16-1. (You can also choose Window⇨Type & Tools⇨Character.) Be sure Show Options is visible in the flyout menu in order to see all the possible options. You can also use the double-arrow iconic button to the left of the panel name to toggle among showing the panel title, the basic options, and all options.

The Character panel provides access to most of InDesign's character formatting options. Three of the options — Font Family, Font Style, and Font Size — are also available via the Type menu, and several options have keyboard shortcuts.

- ✓ **Paragraph panel:** Select a paragraph and open the Paragraph panel (Type⇨Paragraph, or Option+⌘+T or Ctrl+Alt+T). Chapter 15 covers these settings in detail.
- ✓ **Control panel:** The Control panel offers all the formatting options of the Character panel plus others. If the Control panel doesn't show all the character formatting options, select the text and then click the A iconic button on the panel. If the Control panel is not visible (it almost always is), display it by choosing Window⇨Control or pressing Option+⌘+6 or Ctrl+Alt+6.



To change the default character formats — the settings that InDesign will use when you type text into an empty frame — make changes in the Character panel or Control panel when no text is selected or when the text-insertion cursor isn't flashing. That'll save you the hassle of having to reformat new text.

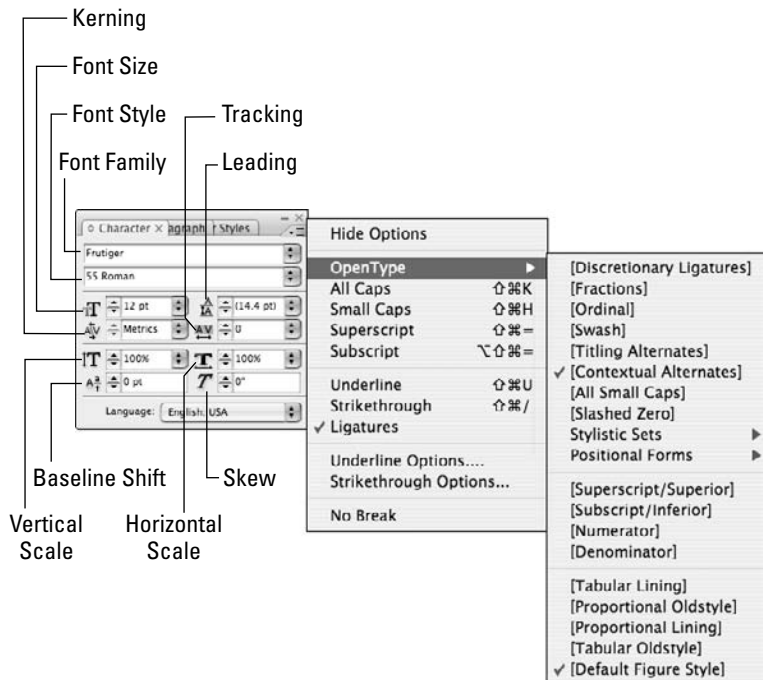


Figure 16-1:
The Character panel and its flyout menu with all options shown.

You can choose to apply character formats to highlighted text in two ways:

- ✔ Create and apply character styles. Character styles offer an important advantage: A character style's settings are stored, so you can apply the exact same settings easily to other text. When you change a character style's settings, any text based on that style is automatically changed to reflect the new settings. (Chapter 14 covers styles in detail.)
- ✔ Use the local controls in the Character panel, the Control panel, the Type menu, or their keyboard shortcuts, which I cover in the upcoming sections.

Even when you do use character styles, you'll probably also do some local formatting from time to time. For example, you would probably use the Character panel to format the type on the opening spread of a feature magazine article, and then use character styles to quickly format the remainder of the article.



If you have a smallish monitor, set at 1024 by 768 pixels — the norm for a 17-inch display — the Character and Character Styles panels are shoved to the bottom of the panel dock, and, when they're selected, the only thing you'll see is their panel tab and flyout menu icon. You have a few choices: Shorten other panel groups in the dock to make room for them, remove other panel groups to make room for them, or drag them out of the dock and make them floating.

Modifying Font, Type Style, and Size

Many people use typographic terms — *font*, *face*, *typeface*, *font family*, and *type style* — inconsistently. Which terms you use doesn't matter as long as you make yourself understood, but I recommend becoming familiar with the font-related terms in InDesign's menus and panels:

- ✔ **Font or typeface:** A collection of characters — including letters, numbers, and special characters — that share the same overall appearance, including stroke width, weight, angle, and style.
For example, Helvetica Regular and Adobe Garamond Semibold Italic are well-known fonts.
- ✔ **Font family:** A collection of several fonts that share the same general appearance but differ in stroke width, weight, and/or stroke angle.
For example, Helvetica and Adobe Garamond are font families.

- ✔ **Font style:** Each of the fonts that make up a font family. When you choose a font family from the Character panel's Font Family menu, InDesign displays the family's font style variations — what most of the design world calls *type styles* — in the accompanying Font Style pop-up menu.

For example, Regular and Semibold Italic are examples of font styles.

Changing font family and font style

When you change from one font to another in InDesign, you can choose a new font family and font style independently in the Character panel. For example, changing from Arial Bold to Times Bold or from Arial Regular to Berthold Baskerville Regular is a simple change of font family (Arial to Berthold Baskerville). However, if you switch from, say, Bookman Light to Century Schoolbook Bold Italic, you're changing both family and style (Bookman to Century, then Light to Bold Italic).

InDesign can display previews of fonts when you select fonts via the Control panel, various text-oriented panels, and the Type menu. You turn on this capability in the Type pane of the Preferences dialog box (choose InDesign⇨ Preferences⇨Type or press ⌘+K on the Mac, or choose Edit⇨Preferences⇨Type or press Ctrl+K in Windows). But doing so makes your menus huge, often so much that they are unwieldy to use. Although it can help you get familiar with your fonts, its unwieldy nature may not be worth that benefit. Only you can decide, but if you do use it, I recommend keeping the preview size small to limit its size.

Whether you use the Control panel or Character panel, you can choose between two methods for changing the font family:

- ✔ Choose the Font Family menu, and then select a name from the list of available font families.
- ✔ Place the cursor in front of or highlight the font name displayed in the Font Family field, type the first few letters of the font family you want to apply, and then press Return or Enter. For example, entering **Cas** selects Caslon (if it's available on your computer).

If you choose only a font family when font styles are available in an accompanying submenu, no changes are applied to the selected text. So be sure to select a font style from the submenu.



When creating character styles, the above controls are available in the Basic Character Formats pane of the New Character Styles and New Paragraph Styles dialog boxes.

Changing type size

You can be very precise with type sizes (what InDesign calls *font size*). InDesign supports sizes from 0.1 point to 1,296 points (108 inches) in increments as fine as 0.001 point. Of course, you want to use good judgment when choosing type sizes. For example, headlines should be larger than subheads, which in turn are larger than body text, which is larger than photo credits, and so on.

Change the type size of highlighted text with the following methods:

- ✓ Choose Type⇨Size, and then choose one of the predefined sizes listed in the Size submenu. If you choose Other from the submenu, the Font Size field is highlighted in the Character panel. Enter a custom size, and then press Return or Enter.
- ✓ Use the Character panel or Control panel:
 - Choose one of the predefined sizes from the Font Size menu.
 - Highlight the currently applied type size displayed in the accompanying editable field, enter a new size, and then press Return or Enter.
 - Make sure the Font Size field is selected, and then use the up and down arrow keys to increase or decrease the size in 1-point increments. Pressing Shift multiplies the increment to 10.
- ✓ Control+click or right-click a text selection, and then choose a size from the Size submenu. If you choose Other from the submenu, the Font Size field is highlighted in the Character panel. Enter a custom size, and then press Return or Enter.



If text is highlighted and the Font Size field is empty, more than one type size is used in the selected text.



When creating character styles, the Font Size control is available in the Basic Character Formats pane of the New Character Styles dialog box.

Using Other Character Formats

In the Control panel, you can adjust other character formats, including all caps, small caps, superscript, subscript, underline, strikethrough, kerning, tracking, horizontal and vertical scale, baseline shift, skew, font style, and language. Through the flyout menu, you can also set ligatures, modify underline

and strikethrough settings, control whether text may break (be hyphenated), select its case (such as all caps and small caps), and select OpenType features. (OpenType fonts can have a dozen kinds of special formatting. These are expert features, so I don't get into the details here, but feel free to explore the options for any OpenType fonts you have.)

In the Character panel, you can adjust kerning, tracking, horizontal and vertical scale, baseline shift, skew, and language. Through its flyout menu (refer to Figure 16-1), you can also set all caps, small caps, superscript, subscript, underline, strikethrough, ligatures, and underline and strikethrough settings, as well as control whether text may break (be hyphenated) and select OpenType features. (InDesign also lets you create custom underlines and strikethroughs, as described in Chapter 17.)



When creating character styles, the kerning, tracking, subscript, superscript, case, ligature, underlining, break, and strikethrough controls are available in the Basic Character Formats pane of the New Character Styles and New Paragraph Styles dialog boxes. The scale, baseline shift, skew, and language controls are in the Advanced Character Formats pane. OpenType controls are in the OpenType Features pane. Custom underline and strikethrough options, covered in Chapter 17, are available in the Underline Options and Strikethrough Options panes, respectively.



You must choose Show Options from the Character panel's flyout menu to display the Vertical Scale, Horizontal Scale, Baseline Shift, Skew, and Language options in the panel.

The Control panel has the same functions as the Character panel, except the all caps, small caps, superscript, subscript, underline, and strikethrough options are in the panel itself rather than in its flyout menu.

Figure 16-2 shows the various effects in action. In its top row, *InDesign* has a different font style applied, *incredible* has been scaled horizontally, and *control* is in all caps, while *over* has had each letter's baseline shifted by a different amount. In the middle row, the word *text* has been skewed, the word *with* is in small caps, a gradient and underline are applied to *typographic*, a custom underline has been applied to *capabilities*, and the word *formatting* has been vertically scaled. In the bottom row, compare the baseline shifts in the top row to the true superscript and subscript following the words *most* and *people*. The word *never* has a custom strikethrough applied, while *even* uses a standard one. The word *heard* has a colored stroke applied and a fill of white.

Figure 16-2:
Various
character
formatting
options
applied
to text.

InDesign has incredible **CONTROL** *Over*
text *formatting*, WITH *typographic capabilities*
most¹ people₂ have *never* even **heard** of!

Horizontal and Vertical Scale options

InDesign's Horizontal Scale option lets you condense and expand type by squeezing or stretching characters. Similarly, the Vertical Scale option lets you shrink or stretch type vertically.

Typographers tend to agree that excessive scaling should be avoided. If you need to make text bigger or smaller, your best bet is to adjust font size; if you need to squeeze or stretch a range of text a bit, use InDesign's kerning and tracking controls (covered later in this chapter) because the letter forms aren't modified — only the space between letters changes when you kern or track text.

Unscaled text has a horizontal and vertical scale value of 100 percent. You can apply scaling values between 1 percent and 1,000 percent. If you apply equal horizontal and vertical scale values, you're making the original text proportionally larger or smaller. In this case, changing font size is a simpler solution.

To change the scale of highlighted text, enter new values in the Horizontal and/or Vertical Scale fields in the Character panel or Control panel. If a value is highlighted in the Horizontal Scale or Vertical Scale field, you can also use the up and down arrow keys to increase and decrease the scaling in 1-percent increments; press Shift to increase or decrease in 10-percent increments.

Baseline shift

The *baseline* is an invisible horizontal line on which a line of characters rests. The bottom of each letter sits on the baseline (except descenders, such as in y, p, q, j, and g). When you perform a *baseline shift*, you move highlighted text above or below its baseline. This feature is useful for carefully placing such characters as trademark and copyright symbols and for creating custom fractions.

To baseline-shift highlighted text, enter new values in the Baseline Shift field in the Character panel or Control panel. You can also use the up and down arrow keys to increase the baseline shift in 1-point increments, or press Shift with the arrow keys to increase or decrease it in 10-point increments.

Skew (false italic)

For fonts that don't have an italic type style, InDesign provides the option to skew, or slant, text to create an artificial italic variation of any font. Like horizontal and vertical text scaling, skewing is a clunky way of creating italic-looking text. Use this feature to create special typographic effects, as shown in Figure 16-3, or in situations where a true italic style is not available. Skewing works better for sans-serif typefaces than for serif typefaces because the characters are simpler and have fewer embellishments that can get oddly distorted when skewed.

To skew highlighted text, you have three options:

- ✓ Enter an angle value between -85 and 85 in the Skew field in the Character panel or Control panel. Positive values slant text to the left; negative values slant text to the right.
- ✓ Press the accompanying up/down arrow keys when the cursor is in the Skew field to skew text in 1-degree increments. Pressing the Shift key with an arrow key changes the increment 4 degrees.
- ✓ You can also skew all the text in a text frame using the Shear tool or by changing the value in the Shear X Angle field in the Control panel after selecting the frame. Slanting text by shearing a text frame does not affect the skew angle of the text. You can specify a skew angle for highlighted text independently from the frame's shear angle.

Figure 16-3:
Characters
in skewed
text can
slant
forward, like
italics, or
backward,
as in this
example.



Skewed shadow

Capitalization options

When you choose All Caps, the uppercase version of all highlighted characters is used: Lowercase letters are converted to uppercase, and uppercase letters remain unchanged.

Similarly, the Small Caps option affects just lowercase letters. When you choose Small Caps, InDesign automatically uses the Small Caps font style if one is available for the font family (few font families include this style). If a Small Caps type style is not available, InDesign generates small caps from uppercase letters using the scale percentage specified in the Advanced Type pane of the Preferences dialog box (choose InDesign⇨Preferences⇨Advanced Type or press ⌘+K on the Mac, or choose Edit⇨Preferences⇨Advanced Type or press Ctrl+K in Windows). The default scale value used to generate small caps text is 70% (of uppercase letters).

Another handy way to change the case of text is to highlight the text and then choose Type⇨Change Case, and then select from the appropriate submenu option: Uppercase, Lowercase, Title Case, and Sentence Case. Title Case capitalizes the first letter in each word, whereas Sentence Case capitalizes the first letter in the beginning of each sentence.

Superscript and Subscript

When you apply the Superscript and Subscript character formats to highlighted text, InDesign applies a baseline shift to the characters, lifting them above (for superscript) or lowering them below (for subscript) their baseline, and reduces their size.

The amount of baseline shift and scaling that's used for the Superscript and Subscript formats is determined by the Position and Size fields in the Advanced Type pane of the Preferences dialog box (choose InDesign⇨Preferences⇨Advanced Type or press ⌘+K on the Mac, or choose Edit⇨Preferences⇨Advanced Type or press Ctrl+K in Windows). The default Position value for both formats is 33.3%, which means that characters are moved up or down by one-third of the applied leading value. The default Superscript and Subscript Size value is 58.3%, which means that superscripted and subscripted characters are reduced to 58.3% of the applied font size. The Advanced Type pane lets you specify separate default settings for Superscript and Subscript.

To apply the Superscript or Subscript format to highlighted text, choose the appropriate option from the Character panel's flyout menu. Figure 16-2 shows examples of characters to which the default Superscript and Subscript settings have been applied.

Underline and Strikethrough

Underline and Strikethrough formats are typographically considered to be unacceptable for indicating emphasis in text, which is better accomplished by using bold and/or italic font styles.

Underlines can be useful in kickers and other text above a headline, as well as in documents formatted to look as if they are typewritten. Strikethrough can be used in cases where you want to indicate incorrect answers, eliminated choices, or deleted text.

If you use underlines and strikethrough, InDesign lets you specify exactly how they look through the Underline Options and Strikethrough Options dialog boxes available in the flyout menus of the Character panel and Control panel.

InDesign lets you create your own underlines and strikethroughs, in addition to using the standard ones, as Chapter 17 explains.

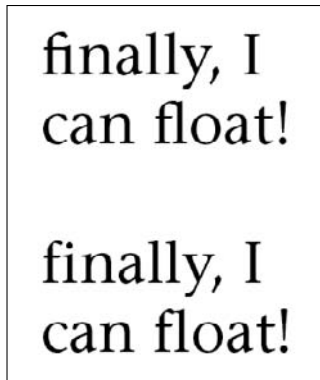
Ligatures

A *ligature* is a special character that combines two letters. Most fonts include just two ligatures — fi and fl. When you choose the Ligature option, InDesign automatically displays and prints a font's built-in ligatures — instead of the two component letters — if the font includes ligatures.

One nice thing about the Ligature option is that, even though a ligature looks like a single character on-screen, it's still fully editable. That is, you can click between the two-letter shapes and insert text if necessary. Also, a ligature created with the Ligature option doesn't cause InDesign's spell checker to flag the word that contains it.

To use ligatures within highlighted text, choose Ligatures from the Character panel's or Control panel's flyout menu (Ligatures is set to On by default). Figure 16-4 shows an example of text with a ligature.

Figure 16-4:
Ligatures
are used
between the
fi and *fl*
letter pairs
in the two
words.



You can also insert ligatures manually:

- ✓ On the Mac, press Option+Shift+5 to insert the *fi* ligature and Option+Shift+6 to insert the *fl* ligature. You can also use the Mac OS X's Character Palette utility or InDesign's Glyphs panel (Type⇨Glyphs, or Option+Shift+F11 or Alt+Shift+F11) to choose them visually.
- ✓ In Windows, you have to use a program such as the Character Map utility that comes with Windows. Choose Start⇨All Programs⇨Accessories⇨System Tools⇨Character Map; if you have the Classic Start menu interface enabled, choose Start⇨Programs⇨Accessories⇨System Tools⇨Character Map.

However, if you do enter ligatures yourself, InDesign's spell checker flags any words that contain them. For this reason, you'll typically want InDesign to handle the task of inserting ligatures automatically.

Turning off hyphenation and other breaks

You can prevent individual words from being hyphenated or a string of words from being broken at the end of a line. For example, you may decide that you don't want to hyphenate certain product names, such as *InDesign*. The No Break option was created for situations such as these.

To prevent a word or a text string from being broken, highlight it, and then choose No Break from the Character panel's flyout menu or the Control panel's flyout menu. You can also prevent a word from being hyphenated by placing a discretionary hyphen (Shift+⌘+– [hyphen] or Ctrl+Shift+– [hyphen]) in front of the first letter. (See Chapter 15 for more on hyphenation controls.)

Controlling Space between Characters and Lines

The legibility of a block of text depends as much on the space around it — called *white space* — as it does on the readability of the font. InDesign offers two ways to adjust the space between characters:

- ✓ **Kerning** is the adjustment of space between a pair of characters. Most fonts include built-in kerning tables that control the space between character pairs, such as *LA*, *Yo*, and *WA*, that otherwise could appear to have a space between them even when there isn't one. For large font sizes — for example, a magazine headline — you may want to manually adjust the space between certain character pairs to achieve consistent spacing.
- ✓ **Tracking** is the process of adding or removing space among all letters in a range of text.

You can apply kerning and/or tracking to highlighted text in $\frac{1}{1000}$ -em increments, called units. An em is as wide as the height of the current font size (that is, an em for 12-point text is 12 points wide), which means that kerning and tracking increments are relative to the applied font size.

Leading (rhymes with sledding) controls the vertical space between lines of type. It's traditionally an attribute of paragraphs, but InDesign lets you apply leading on a character-by-character basis. To override the character-oriented approach, ensuring that leading changes affect entire paragraphs, check the Apply Leading to Entire Paragraphs option in the Type pane of the Preferences dialog box (choose InDesign⇨Preferences⇨Type or press ⌘+K on the Mac, or choose Edit⇨Preferences⇨Type or press Ctrl+K in Windows).

Kerning

The Kerning controls in the Character panel and Control panel provide three options for kerning letter pairs:

- ✓ **Metrics:** Controls the space between character pairs in the highlighted text using a font's built-in kerning pairs.
- ✓ **Optical:** Evaluates each letter pair in highlighted text and adds or removes space between the letters based on the shapes of the characters.
- ✓ **Manual:** Adds or removes space between a specific letter pair in user-specified amounts.

When the flashing text cursor is between a pair of characters, the Kerning field displays the pair's kerning value. If Metrics or Optical kerning is applied, the kerning value is displayed in parentheses.

To apply Metrics or Optical kerning to highlighted text, choose the appropriate option from the Kerning pop-up menu. To apply manual kerning, click between a pair of letters, and then enter a value in the Kerning field or choose one of the predefined values. Negative values tighten; positive values loosen.



When letter shapes start to collide, you've tightened too far.

Tracking

Tracking is uniform kerning applied to a range of text. You might use tracking to tighten character spacing for a font that you think is too spacey or loosen spacing for a font that's too tight. Or you could track a paragraph tighter or looser to eliminate a short last line or a *widow* (the last line of a paragraph that falls at the top of a page or column).

To apply tracking to highlighted text, enter a value in the Character panel's or Control panel's Tracking field or choose one of the predefined values. Negative values tighten; positive values loosen (in 0.001-em increments).



You might wonder how tracking is different than kerning. They're essentially the same thing, with this difference: Tracking applies to a selection of three or more characters, whereas kerning is meant to adjust the spacing between just two characters. You use tracking to change the overall tightness of character spacing; you use kerning to improve the spacing between letters that just don't quite look right compared to the rest of the text.

Leading

Leading refers to the vertical space between lines of type as measured from baseline to baseline. Leading in InDesign is a character-level format, which means that you can apply different leading values within a single paragraph. InDesign looks at each line of text in a paragraph and uses the largest applied leading value within a line to determine the leading for that line.

By default, InDesign applies Auto Leading to text, which is equal to 120 percent of the type size. As long as you don't change fonts or type sizes in a paragraph, Auto Leading works pretty well. But if you do change fonts or sizes, Auto Leading can result in inconsistent spacing between lines. For this reason, specifying an actual leading value is safer.

In most cases, using a leading value that is slightly larger than the type size is a good idea. When the leading value equals the type size, text is said to be set *solid*. That's about as tight as you ever want to set leading, unless you're trying to achieve a special typographic effect or working with very large text sizes in ad-copy headlines. As is the case with kerning and tracking, when tight leading causes letters to collide — ascenders and descenders are the first to overlap — you've gone too far.

You can change InDesign's preset Auto Leading value of 120%. To do so, choose Type⇨Paragraph, or press Option+⌘+T or Ctrl+Alt+T, to display the Paragraph panel. Choose Justification in the flyout menu, enter a new value in the Auto Leading field, and then click OK. (Why a character format setting is accessed via the Paragraph panel and what Auto Leading has to do with Justification are both mysteries.)

To modify the leading value applied to selected text, choose one of the predefined options from the Leading pop-up menu in the Character panel or Control panel, or enter a leading value in the field. You can enter values from 0 to 5,000 points in 0.001-point increments. You can also use the up and down arrow keys to change leading in 1-point increments.

Chapter 17

Tricks with Text

In This Chapter

- ▶ Adding bullets and formatting lists
 - ▶ Creating reverse type
 - ▶ Specifying optical margin alignment
 - ▶ Creating custom underlines and strikethroughs
 - ▶ Converting text to graphics
 - ▶ Running text along a path
-

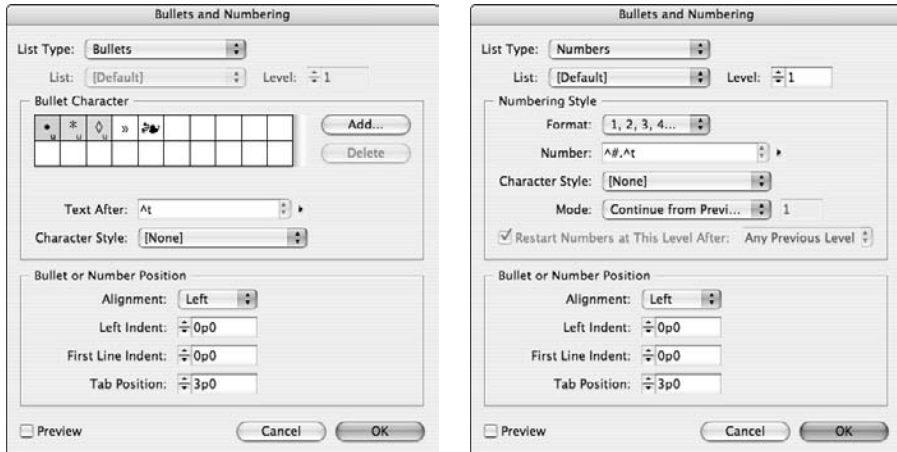
With the myriad of text-formatting techniques available in InDesign, you can create some snazzy and sophisticated effects. You can stretch, skew, rotate, and color text. You can use a wide range of characters for bullets. You can add shadows and feathering effects to give words a dramatic flair. As with all good things, moderation in your use of text effects will keep your documents looking professional. This chapter shows you some InDesign features that can produce typographic special effects and gives some suggestions on when to use them. (Chapters 15 and 16 cover more prosaic formatting controls.)

You can also apply all sorts of transformations to text frames, which affects the text inside of them. Chapter 9 covers these capabilities.

Using Bulleted and Numbered Lists

Automatic bullets and numbering are available as a paragraph format in InDesign. You access these options (after selecting the paragraphs you want to make into automatic lists, of course) by choosing Bullets and Numbering Options from the Paragraph panel's or Control panel's flyout menus. Doing so displays the Bullets and Numbering dialog box shown in Figure 17-1.

Figure 17-1:
The Bullets
and
Numbering
dialog box
set for
bullets
(left) and
numbering
(right).



To set bullets or numbered lists in the Bullets and Numbering dialog box, first select either Bullets or Numbers from the List Type pop-up menu, and then follow these steps (select the Preview check box to see the results of your choices before you finalize them):

1. For bullets, choose a bullet character from the Bullet Character area.

The area will show bullet characters available for the current font; you can change the selection by changing the selected font or by clicking the Add button.

For numbered lists, choose a numbering style from the Format pop-up menu, format the numbers' appearance by choosing spaces and number placeholders from the pop-up menu to the right, and choose whether the numbers continue or start anew at this paragraph through the Mode pop-up menu (your choices are Continue from Previous Number and Start At).

In the Number field (which replaces the previous version's Separator pop-up menu), you can insert all sorts of special spaces and characters, giving you broad control on how numbers display. You can also choose number placeholders, which tell InDesign what numbers to insert in the list. For simple lists, choose Current Level from the Insert Number Placeholder pop-up submenu. The other levels are used when you have sublists, an expert feature. You can also choose Chapter Number to insert the chapter's number as the list item's number.

The Mode pop-up menu replaces the previous version's Start At field.

2. Adjust the font settings for the bullets or numbers by using the Character Style pop-up menu to choose a character style.

The default setting ([None]) uses the paragraph's current formatting.





The Character Style pop-up menu replaces the previous version's Font Family, Font Style, Size, and Color options.

- 3. In the Bullet or Number Position section of the dialog box, set the indentation for the list.** Using the Alignment pop-up menu, choose Left, Center, or Right to determine where the bullet or numeral is positioned within its tab. You can set the hanging indent amount and the bullet's or number's overhang by using the Left Indent, First Line Indent, and Tab Position fields.



This Bullet or Number Position section's settings have changed to provide greater control over the list's indentation and bullet or number position.

- 4. When you finish formatting the bulleted or numbered list, click OK.**



InDesign CS3 gives you even more control over bulleted and numbered lists through the new options you get by choosing Type⇨Bulleted & Numbered Lists:

- ✓ The Apply/Remove Bullets and Apply/Remove Numbers submenu options quickly let you turn on or off the bullets or numbering for selected paragraphs. You can also use the iconic buttons for these controls on the Control panel.
- ✓ The Restart/Continue Numbering is a handy way to control which paragraphs are numbered, such as when you have an unnumbered paragraph within a list. (These options are also available in the flyout menu of the Paragraph panel and Control panel.)
- ✓ The Convert Bullets to Text and Convert Numbering to Text options remove the automatic bullets or numerals in a paragraph but leave an actual bullet character or numeral at the beginning of the paragraph for you to do as you please.

A more expert option is the Define Lists option (available in two places: by choosing Type⇨Bulleted & Numbered Lists⇨Define Lists, or by choosing Define Lists from the Paragraph panel's flyout menu). Here, you create list styles with just two options: Continue Numbers Across Stories and Continue Numbers from Previous Document in a Book. These list styles are accessed when you create or edit paragraph styles using the style dialog boxes' Bullets and Numbering pane, or when you apply bullets and numbering through the Paragraph panel's or Control panel's flyout menu. (Either way, choose the appropriate style in the List pop-up menu.)

When you choose the first option, InDesign continues numbering text based on the last number used in the previous story rather than restart the numbering at each story (the normal behavior). When you choose the second option, InDesign continues numbering text based on the last number used in the previous chapter of a book (see Chapter 23) rather than start over again with this document (the normal behavior).

It's possible that the bulleted or numbered list you're working with was first created in a word processor and then placed in InDesign. Perhaps the writer simply used an asterisk followed by a space to indicate a bullet, or used the word processor's automatic bullet or numbering feature. You can deal with imported bulleted and numbered lists as described in Chapter 12.



For the bullets in a list, you're not limited to using the small round bullet (•) included in most typefaces. You can use any character in the body text font, or you can switch to a symbol or pi font and choose a more decorative character. Zapf Dingbats and Wingdings are the most common symbol fonts, offering an array of boxes, arrows, crosses, stars, and check marks.

Labeling Paragraphs

Along with using drop caps, which I cover in Chapter 15, changing the formatting of the first few words in a paragraph as a *label* can serve as a visual indicator that the reader has arrived at the beginning of a story, chapter, or new topic. To experiment with label formatting, use the attributes available via the Character panel or Control panel and their flyout menus, such as font changes, horizontal scale, or small caps. After you decide on the formatting for labels, you can apply it by using character styles after paragraph styles are applied — and after the text is final. You might also be able to use the nested styles feature if the label text follows a specific pattern, such as a specific number of words or characters or an entire sentence.



A real easy way to consistently apply the desired label formatting to text is to use a nested style, as explained in Chapter 14.

The following descriptions show frequently used label formatting:

- ✓ **Boldface:** Bold type is often used for titles and subheads in magazines, newspapers, and reports. To apply boldface in InDesign, select the bold version of the typeface from the Font Style pop-up menu in the Character panel.
- ✓ *Italics:* Italic text is a good choice for emphasizing specific words and for applying to tertiary heads. To apply italics in InDesign, select the oblique version of the typeface from the Font Style pop-up menu on the Character panel.
- ✓ Underlines: Underlined text isn't used as frequently as it once was, simply because page-layout programs such as InDesign offer more sophisticated options for labeling text. Still, you might have occasion to use underlines, such as to emphasize a label. Use the Underline command in the menu on the Character panel or via the iconic button in the

Control panel's character (A) pane. Note that you have no control over the style, thickness, or placement of the underline if you use this option; for custom underlines, use the controls described later in this chapter.

- ✓ **SMALL CAPS:** Small caps offer a subtle, classic look that blends well with the rest of the document. You have two choices for applying small caps from the Character pane: Choose a small-caps variation of a typeface from the Font Style pop-up menu or choose the Small Caps command from the Character panel's flyout menu, or via the iconic button in the Control panel's character (A) pane.
- ✓ **Typeface change:** Rather than relying on different variations of a font, you can use a different font altogether, such as Futura Medium, for a label. To contrast with serif body text, you might choose a sans-serif typeface that complements the look of your publication. To apply a different typeface, use the Font Family pop-up menu in the Character panel or Control panel.
- ✓ **S c a l e d t e x t :** Scaling text horizontally — up 10 or 20 percent — is a subtle effect that makes the section of text visually distinct. Scaling text vertically, however, can be *too* subtle unless combined with boldface or another style. Use the Horizontal Scale and Vertical Scale fields in the Character panel or Control panel to scale text.
- ✓ **Size change:** Bumping the size of a label up a point or two is another subtle design choice. To change the size of type, use the Font Size field in the Character panel or Control panel.

Adding Special Type Treatments

Skilled graphic designers make decisions based on what best serves the content. In doing so, they often rely on special typographic techniques. For example, the use of reverse type helps to break up pages and to organize text, while careful formatting of fractions and hanging punctuation adds a professional touch.

Reversing type out of its background

Reversed type is white type on a black background rather than black type on a white background. Of course, reversed type doesn't have to be white on black; it can be any lighter color on a darker color. You often find reversed type in table headings, kickers (explanatory blurbs following headlines), and decorative layout elements.

To lighten the text, highlight it with the Type tool, click the Fill button on the Tools panel, and choose a light color from the Swatches panel (Window⇧⇧ Swatches or F5). For the dark background, you have three options: filling the text frame with a darker color, making the text frame transparent and placing it on top of darker objects, or placing a thick, dark ruling line behind the text.

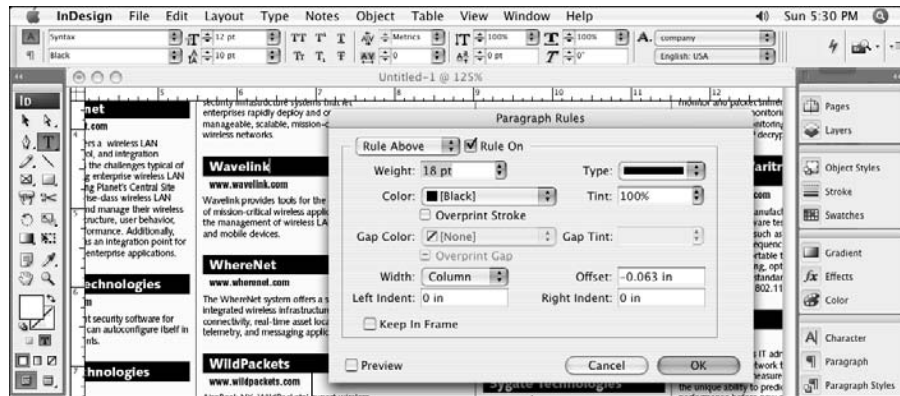
For the first two options, select the text frame and then click the Fill iconic button on the Tools panel.

- ✓ To fill the text frame with a darker color, click a color from the Swatches panel.
- ✓ To make the text frame transparent, click the Apply None iconic button on the Tools panel. Then place the text frame in front of a darker object or graphic.

To create reversed type that is not in its own text frame, use a ruling line of the appropriate width (at least a couple points larger than the text size). If you use a Ruling Line Above, move the line down behind the text; if you use a Ruling Line Below, move it up. Figure 17-2 shows reversed type used as a heading, as well as the Paragraph Rules dialog box and the settings used to create the effect. (To access this dialog box, choose Paragraph Rules from the flyout menu of the Control panel's ¶ pane or of the Paragraph panel, or press Option+⌘+J or Ctrl+Alt+J.)

I explain how to create and adjust ruling lines in greater detail in Chapter 15.

Figure 17-2: This travel guide uses reversed-out text, created via ruling lines, for its subtitles.



Reversed type

Creating sidebars and pull-quotes

A *sidebar* is supplemental text that is often formatted differently from the rest of the document and placed within a shaded or outlined box. Sidebars help break up text-heavy pages and call attention to information that is often interesting but not essential to the main story.

Particularly in text-heavy publications, pulling in-depth information or related text into sidebars can help provide visual relief. To create a sidebar, you usually place the text in its own frame, then stroke the frame and optionally fill it with a tint. To inset the text from the edges of the frame, use the Text Frame Options dialog box (Object⇨Text Frame Options or ⌘+B or Ctrl+B).

A *pull-quote* is a catchy one- or two-line excerpt from a publication that is enlarged and reformatted to achieve both editorial and design objectives. Pull-quotes draw readers into articles with excerpts that do everything from summarize the content to provide shock value. From the design perspective, pull-quotes break up static columns and offer opportunities for typographic treatment that emphasizes the content, such as colors and typefaces that support the mood of an article.

To create a pull-quote, copy and paste the relevant text into its own text frame and then reformat the text and frame as you wish. Use the Text Wrap panel (Window⇨Text Wrap or Option+⌘+W or Ctrl+Alt+W) to control how text in columns wraps around the pull-quote.



To create sidebars, pull-quotes, or other such elements that stay close to the text that refers to them, use the anchored-object feature described in Chapter 11.

Formatting fractions

Creating fractions that are formatted correctly can be handy. Compare the top line in Figure 17-3, which is not formatted appropriately for a fraction, to the bottom line, which is correctly formatted. Although InDesign doesn't provide an automatic fraction maker, you can use OpenType typefaces, expert typefaces, or character formats to achieve professional-looking fractions.

Applying a fraction typeface

Some expert typefaces include a variation, appropriately called Fractions, that includes a number of common fractions, such as $\frac{1}{2}$, $\frac{1}{3}$, $\frac{1}{4}$, and $\frac{3}{4}$. Adobe has Expert Collection variants for many of its popular Type 1 PostScript fonts; these collections include true small caps, true fractions, and other typographic characters. You can also use a symbol font, though the numerals may not exactly match the appearance of numerals in the rest of your text because symbol fonts typically use plain fonts like Helvetica as their basis.

To use a true fraction from an Expert Collection font, choose Type⇨Glyph (or press Option+Shift+F11 or Alt+Shift+F11), select the font and face from the pop-up menus at the bottom of the dialog box shown in Figure 17-3, and then select the fraction you want to use.

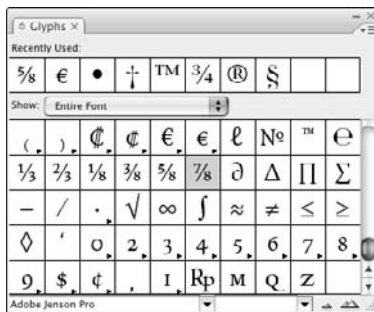
If you have OpenType fonts, the process can be automated: Be sure that the Fraction option is enabled for the selected text, either as part of its character or paragraph style, or by highlighting the text and adjusting the OpenType options directly:

- ✓ For styles, go to the OpenType Features pane when creating or modifying a paragraph or character style, and check Fractions.
- ✓ For local formatting, highlight the text containing the fraction and then choose OpenType⇨Fraction from the flyout menu of the Character panel or Control panel — be sure that Fraction is checked in the menu.



These OpenType options have no effect on non-OpenType fonts.

Figure 17-3: The Glyphs panel lets you choose special characters not accessible easily (or at all) from the keyboard.



Formatting fractions manually

If you're dealing with a wide range of fractions in something like a cookbook, you probably won't find all the fractions you need in your Expert Collection or OpenType font. And regular Type 1 Postscript and TrueType fonts certainly won't have the desired fractions. Because it would be difficult to format fractions such as $\frac{3}{6}$ exactly the same as, say, an expert font's $\frac{1}{4}$, you might opt for formatting all the fractions manually.

The built-in fractions in expert and OpenType fonts are approximately the same size as a single character in that font, and this is your eventual goal in formatting a fraction manually. Usually, you achieve this by decreasing the size of the two numerals, raising the numerator (the first, or top, number in the fraction) using the baseline shift feature, and kerning on either side of the slash as necessary. (Chapter 16 covers these controls.) Figure 17-4 shows examples of an unformatted fraction, an expert font's fraction, an OpenType-generated fraction, and a manually created fraction.



Macintosh PostScript and TrueType fonts (as well as expert fonts and OpenType fonts for both Windows and Macintosh) provide another option for refining fractions: a special kind of slash called a *virgule*, which is smaller and at more of an angle than a regular slash. Press Option+Shift+1 to enter a virgule, then kern around it as you would a slash. (You can see how a virgule differs from a slash in Figure 17-4: The first and fourth fractions use slashes, while the second and third use virgules.)

Unless you rarely use fractions, by all means save your formatting as character styles. You can apply the formats with a keystroke or use Find/Change (Edit⇧Find/Change or ⌘+F or Ctrl+F) to locate numbers and selectively apply the appropriate character style.

Figure 17-4:

Four ways to make a fraction (from left to right): unformatted, via expert fonts, via OpenType fonts, and via manual formatting.

Optical margin alignment

When display type, such as a pull-quote or headline type in ads, is left-aligned or justified, the edges can look uneven due to the gaps above, below, or next to quotation marks, other punctuation, and some capital letters. Notice the text frame on the left in Figure 17-5, which does not have hanging punctuation. To correct the unevenness, you can use a technique called *hanging punctuation*, or *optical margin alignment*, which extends the punctuation slightly beyond the edges of the rest of the text.



Figure 17-5: Notice the difference between the standard alignment on the left and the hanging punctuation on the right.



The “edge” of text is defined by the edges of the text frame or any Inset Spacing specified in the Text Frame Options dialog box (Object⇧Text Frame Options or ⌘+B or Ctrl+B).

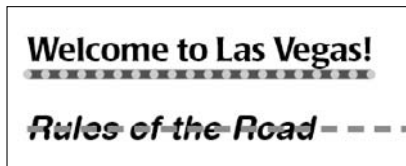
The optical margin alignment feature automates hanging punctuation, extending punctuation and the edges of some glyphs (such as the capital *T*) slightly outside the edges of the text. Unfortunately, you can’t control how much the characters “hang” outside the text boundaries — InDesign decides that for you. And optical margin alignment applies to all the text frames in a story, rather than to highlighted text. Therefore, you need to isolate any text for which you want hanging punctuation into its own story.

To specify optical margin alignment, select any text frame in a story and choose Type⇧Story. In the Story panel, check the Optical Margin Alignment option, as shown in Figure 17-5

Custom underline and strikethrough options

You can use InDesign to create text with custom underlines and strikethroughs. Although you should use these effects sparingly, they can be effective for signs and other design-oriented text presentations, such as the examples shown in Figure 17-6.

Figure 17-6:
Examples of
custom
underlines
and strike-
throughs.



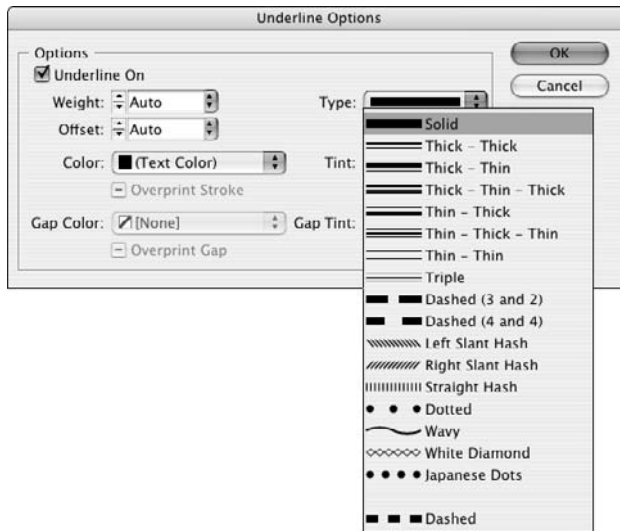
You can find both the Underline Options and Strikethrough Options menu items in the flyout menu of the Character panel's and of the Control panel's A pane, and you can use these menu options to get just the look you're interested in. The process for setting both Underline Options and Strikethrough Options is similar:

- 1. Highlight the text to which you want the custom underline or strikethrough.**
- 2. Specify the thickness, type, color, and other settings for the line that makes up the underline or the strikethrough line.**

If you choose an underline or strikethrough line type that has gaps — such as dashed, dotted, or striped lines — you can also choose a gap color. Figure 17-7 shows the Underline Options dialog box; the Strikethrough Options dialog box is almost identical.
- 3. Apply the underline style via the Control panel, Character panel, or keyboard shortcut (Shift+⌘+U or Ctrl+Shift+U). Apply the strikethrough style via the Control panel, Character panel, or keyboard shortcut (Shift+⌘+/ or Ctrl+Shift+/).**

Note that a custom underline or strikethrough created and applied this way is in effect only for the first text to which an underline or strikethrough is applied. InDesign reverts to the standard settings the next time you apply an underline or strikethrough. If you want to use a custom underline or strikethrough setting repeatedly, you should define the setting as part of a character style.

Figure 17-7:
The Underline Options dialog box. The Type pop-up menu presents a list of line types available for underlines.



Converting Text into Shapes

If you want to use the shape of a letter or the combined shapes of several letters as a frame for text or a graphic, you could test your skill with the Pen tool and create the letter shape(s) yourself. But getting hand-drawn characters to look just the way you want them to can take lots of time. A quicker solution is to use the Create Outlines command to convert text characters into editable outlines. The Create Outlines command is particularly useful if you want to hand-tweak the shapes of characters, particularly at display font sizes, or place text or a graphic within character shapes.



If all you need to do is apply a stroke or fill to characters within text, you don't have to convert the characters into outlines. Instead, simply highlight the characters and use the Stroke panel (Window⇧Stroke, or ⌘+F10 or Ctrl+F10) and Swatches panel (Window⇧Swatches or F5) to change their appearance. This way you can still edit the text. (See Chapter 8 for more details.)

When you use the Create Outlines command, you have the choice of creating an inline compound path that replaces the original text or an independent compound path that's placed directly on top of the original letters in its own frame. If you want the text outlines to flow with the surrounding text, create an inline compound path. If you want to use the outlines elsewhere, create an independent compound path.

To convert text into outlines:

1. **Use the Type tool to highlight the characters you want to convert into outlines.**

Generally, this feature works best with large font sizes.

2. **Choose Type⇨Create Outlines or press Shift+⌘+O or Ctrl+Shift+O (that's the letter O, not a zero).**

If you hold down the Option or Alt key when you choose Create Outlines, or if you press Shift+Option+⌘+O or Ctrl+Alt+Shift+O, a compound path is created and placed in front of the text. In this case, you can use either of the selection tools to move the resulting compound path. If you don't hold down Option or Alt when you choose Create Outlines, an inline compound path is created. This object replaces the original text and flows with the surrounding text.

After you create text outlines, you can modify the paths the same as you can modify hand-drawn paths. You can also use the transformation tools, the Control panel (Window⇨Control, or Option+⌘+6 or Ctrl+Alt+6), and the Transform panel (Window⇨Transform) to change the appearance of text outlines. You cannot, however, edit text after converting it to outlines.

Additionally, you can use the Place command (File⇨Place, or ⌘+D or Ctrl+D) or the Paste Into command (Edit⇨Paste Into, or Option+⌘+V or Ctrl+Alt+V) to import text or a graphic into the frames created by converting text to graphics.

Making Text Follow a Path

InDesign lets you have text follow any open or closed path, such as a line or frame. Simply select the path or shape with the Type on a Path tool, which is available from the Type tool's pop-up menu. Now start typing (or paste or place) your text.

Once you have entered the text and formatted it with font, size, color, and so forth, you can apply special effects to it using the Type on a Path Options dialog box, accessed by choosing Type⇨Type on a Path⇨Options and then selecting from its options.

You can also double-click the Type on a Path tool to open the Type on a Path Options dialog box.

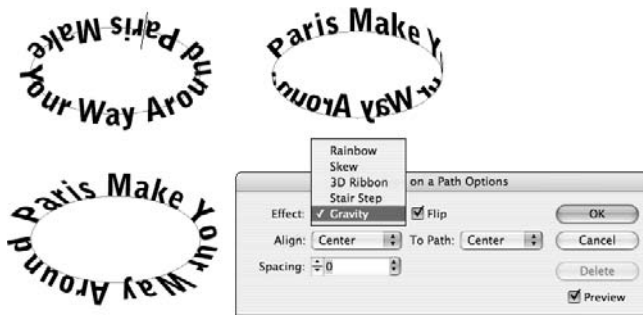


Figure 17-8 shows the dialog box and several examples of its formatting. In the dialog box:

- ✔ Use the Effect pop-up menu to choose a visual effect.
- ✔ Use the Align pop-up menu to choose what part of the text is aligned (baseline, center, ascender, or descender).
- ✔ Use the To Path pop-up menu to choose whether to align to the center, bottom, or top of the path.
- ✔ Flip the text by selecting the Flip option.
- ✔ Change the text's spacing by entering a value in the Spacing field (positive numbers space out the text, while negative ones contract it).

Figure 17-8:

The Type on a Path Options dialog box lets you apply special effects, alignment, and flip to text following a path.



Part V

Graphics Essentials

The 5th Wave

By Rich Tennant



"You know kids – you can't buy them just any web authoring software."

In this part . . .

They say a picture is worth a thousand words. Well, a lot of them are. Graphics make layouts come alive, providing a visceral connection that text by itself just cannot. So it should be no surprise that InDesign has tons of features to work with and even create graphics. This part shows you how to work with imported graphics files, cropping them and making them fit your layout's canvas.

You might wonder why this part is so short, given how many graphical effects InDesign offers. If you skipped Part III, that confusion is understandable: InDesign lets you apply most of its special effects and controls to *any* object, not just those containing graphics, so Part III covers that common razzle-dazzle in one place.

Chapter 18

Importing Graphics

In This Chapter

- ▶ Preparing graphics for use in InDesign
 - ▶ Importing and placing graphics
 - ▶ Working with layered images
-

What is a layout without graphics? Boring, that's what. And that's why InDesign lets you import a wide variety of graphics types, so you have a lot of choices and flexibility in the images you use.

And through the Mac and Windows Clipboards (copy and paste), you can import file formats — to a limited degree — that are not directly supported by InDesign.



The terms *graphic* and *picture* are interchangeable, referring to any type of graphic — though InDesign consistently uses the word *graphic* in its user interface and documentation. An *image* is a bitmapped graphic, such as that produced by an image editor, digital camera, or scanner, while an *illustration* or *drawing* is a vector file produced by an illustration program.

Preparing Graphics Files

InDesign offers support for many major formats of graphics files. Some formats are more appropriate than others for certain kinds of tasks. The basic rules for creating your graphics files are as follows:

- ✓ Save line art (drawings) in a format such as EPS, PDF, Adobe Illustrator, Windows Metafile (WMF), Enhanced Metafile (EMF), or PICT. (These object-oriented formats are called *vector* formats. Vector files are composed of instructions on how to draw various shapes.) InDesign works best with EPS, PDF, and Illustrator files.

- ✓ Save bitmaps (photos and scans) in a format such as TIFF, Adobe Photoshop, PNG, JPEG, PCX, Windows Bitmap (BMP), GIF, Scitex Continuous Tone (SCT), or PICT. (These pixel-oriented formats are called *raster* formats. Raster files are composed of a series of dots, or pixels, that make up the image.) InDesign works best with TIFF and Photoshop files.



InDesign CS3 can also import InDesign files as if they were graphics — in a multi-page document, you choose the page you want to import, as you can with PDF files. Note that InDesign files imported as graphics cannot be edited in your InDesign layout (you must update the original file instead).



Make EPS and TIFF formats your standards because these have become the standard graphics formats in publishing. If you and your service bureau are working almost exclusively with Adobe software, you can add the PDF, Illustrator, and Photoshop formats to this mix. (The Illustrator and PDF formats are variants of EPS.) If you use transparency in your graphics, it's best to save them in Photoshop, Illustrator, or PDF formats, because other formats (particularly EPS and TIFF) remove much of the transparency layering data that will help an imagesetter optimally reproduce those transparent files.

The graphics file formats that InDesign imports include (the text in monofont is the PC filename extension for the format):

- ✓ **BMP:** The native Windows bitmap format (.bmp, .dib).
- ✓ **EPS:** The Encapsulated PostScript file format favored by professional publishers (.eps).
- ✓ **GIF:** The Graphics Interchange Format common in Web documents (.gif).
- ✓ **JPEG:** The Joint Photographers Expert Group compressed bitmap format often used on the Web (.jpg).
- ✓ **Illustrator:** The native format in Adobe Illustrator 5.5 through CS3. This file format is similar to EPS (.ai).
- ✓ **PCX:** The PC Paintbrush format that was very popular in DOS programs and early version of Windows; it has now been largely supplanted by other formats (.pcx, .rle).
- ✓ **PDF:** The Portable Document Format that is a variant of EPS and is used for Web-, network-, and CD-based documents. InDesign CS3 supports PDF versions 1.3 through 1.7 (the formats used in Acrobat 4 through 8) (.pdf).
- ✓ **Photoshop:** The native format in Adobe Photoshop 5.0 through CS3 (.psd). (Note that InDesign cannot import the Photoshop Raw format.)

- ✓ **PICT:** Short for *Picture*, the Mac's native graphics format until Mac OS X (it can be bitmap or vector) that is little used in professional documents and has become rare even for inexpensive clip art (.pct).
- ✓ **PNG:** The Portable Network Graphics format introduced more than a decade ago as a more capable alternative to GIF (.png).
- ✓ **QuickTime movie:** For use in interactive documents, InDesign supports this Apple-created, cross-platform format (.mov).
- ✓ **Scitex CT:** The continuous-tone bitmap format used on Scitex prepress systems (.ct).
- ✓ **TIFF:** The Tagged Image File Format that is the bitmap standard for professional image editors and publishers (.tif, .tiff).
- ✓ **Windows Metafile:** The format native to Windows but little used in professional documents. Since Office 2000, Microsoft applications create a new version called Enhanced Metafile, also supported by InDesign (.wmf, .emf).



Spot colors (called spot inks in Photoshop) are imported into InDesign when you place Photoshop, Illustrator, and PDF images into InDesign, as well as for InDesign documents imported as graphics. They appear in the Swatches panel, which is covered in Chapter 7.

Importing and Placing Graphics

It's important to understand that when you import a graphic into a document, InDesign establishes a link between the graphics file and the document file and then sends the original graphics file to the printer when the document is output. (For more details on managing linked files, see Chapter 10.)

InDesign links to graphics because a graphics file, particularly a high-resolution scanned graphic, can be very large. If the entire graphics file is included in an InDesign document when you import it, InDesign documents would quickly become prohibitively large. Instead, InDesign saves a low-resolution preview of an imported graphics file with the document, and it's this file that you see displayed on-screen. InDesign remembers the location of the original file and uses this information when printing.

The Place command (File⇨Place, or ⌘+D or Ctrl+D) is the method you typically use to bring graphics into your InDesign layout. Here's how to use the Place command to import a graphic:

1. Choose File⇨Place or press ⌘+D or Ctrl+D.

If you want to import a graphic into an *existing frame*, select the target frame using either of the selection tools (either before you choose File⇨Place or afterwards). If you want InDesign to create a *new frame* when you import the graphic, make sure no object is selected when you choose Place. Either way, the Place dialog box appears.



You can import a graphic into any kind of frame or shape (including a curved line created with the Pen tool) except a straight line. Be careful: If the Type tool is selected when you use the Place command to import a graphic into a selected text frame, you'll create an inline graphic at the text cursor's location.

2. Use the controls in the Place dialog box to locate and select the graphics files you want to import.

You can now select multiple files — graphics and/or text — by Shift+clicking a range or ⌘+clicking or Ctrl+clicking multiple files one by one. InDesign will let you place each file in a separate frame. Just click once for each file imported, or Shift+⌘+click or Ctrl+Shift+click to have InDesign place all files on the page in separate frames. The loaded-graphic icon will show the number of files to be placed, as well as a mini preview of each file, as Figure 18-1 shows. You can also navigate through these previews using the keyboard's left and right arrow keys, so you can control more easily which file is placed when.

3. Specify the desired import options, if any are applicable. If you want to display import options that let you control how the selected graphics file is imported, either select Show Import Options, and then click Open; or hold down the Shift key and double-click on the filename or Shift+click Open. If you choose to Show Import Options, the EPS Import Options, Place PDF, Place InDesign Document, or Image Import Options dialog box, depending on what kind of graphic you are importing, is displayed. Click OK after selecting the desired options. (These options are covered later in this chapter.)**4. You can place a graphic in an existing frame or in a new frame, as follows:**

- If an empty frame is selected, the graphic is automatically placed in the frame. The upper-left corner of the graphic is placed in the upper-left corner of the frame, and the frame acts as the cropping shape for the graphic.
- If a frame already holding a graphic is selected, InDesign will replace the existing graphic with the new one if you've selected the Replace

Selected Item check box in the Place dialog box. Otherwise, InDesign will assume you want to put the new graphic in a new frame.

- To place the graphic into a new frame, click the loaded-graphic icon on an empty portion of a page or on the pasteboard. The point where you click establishes the upper-left corner of the resulting graphics frame, which is the same size as the imported graphic and which acts as the graphic's cropping shape.
- To place the graphic in an existing, unselected frame, click in the frame with the loaded-graphic icon. The upper-left corner of the graphic is placed in the upper-left corner of the frame, and the frame acts as a cropping shape.

Figure 18-1:
The loaded-graphic icon displays a preview image of the imported graphics, as well as the number of graphics ready to be placed.



After you place a graphic, it's displayed in the frame that contains it, and the frame is selected. If the Selection tool is selected, the eight handles of its bounding box are displayed; if the Direct Selection tool is selected, handles are displayed only in the corners. At this point, you can modify either the frame or the graphic within, or you can move on to another task.



When importing JPEG files, InDesign automatically scales the image to fit in the page. This feature helps deal with digital-camera graphics that tend to be very large in dimension, so when imported end up taking much more than the width of a page. Although you'll likely still need to scale the image to fit your layout, you can at least see the whole image before doing so.

Specifying Import Options

If you've ever used a graphics application — for example, an image-editing program like Adobe Photoshop or an illustration program like Adobe Illustrator or CorelDraw — you're probably aware that when you save a graphics file, you have several options that control such things as file format, image size, color depth, preview quality, and so on. When you save a graphics file, the settings you specify are determined by the way in which the image will be used. For example, you could use Photoshop to save a high-resolution TIFF version of a scanned graphic for use in a slick, four-color annual report or a low-resolution GIF version of the same graphic for use on the company's Web page. Or you could use Illustrator or CorelDraw to create a corporate logo that you'll use in various sizes in many of your printed publications.

If you choose to specify custom import settings when you import a graphics file, the choices you make will depend on the nature of the publication. For example, if it's bound for the Web, there's no need to work with or save graphics using resolutions that exceed a computer monitor's 72-dpi resolution. Along the same lines, if the publication will be printed, the image import settings you specify for a newspaper that will be printed on newsprint on a SWOP (Specifications for Web Offset Publications) press will be different than those you specify for a four-color magazine printed on coated paper using a sheet-fed press.

If you select Show Import Options when you place a graphic, the options displayed in the resulting dialog boxes depend on the file format of the selected graphic. When you set options for a particular file, the options you specify remain in effect for that file format until you change them. If you don't select the Show Import Options check box when you place a graphic, the most recent settings for the file format of the selected graphic are used.

Import options for bitmap graphics

InDesign gives you two sets of import options for the following types of bitmap images: TIFF, GIF, JPEG, Scitex CT, BMP, and PCX. You get three options for PNG files, and a different set of three for Photoshop files. No import options are available for PICT or QuickTime movie files. Figure 18-2 shows three of the four possible panes for bitmap images: The Image and Color panes are for most bitmap formats; PNG files have a third pane, PNG Settings, and Photoshop files also have a third pane, Layers, covered later in this chapter.

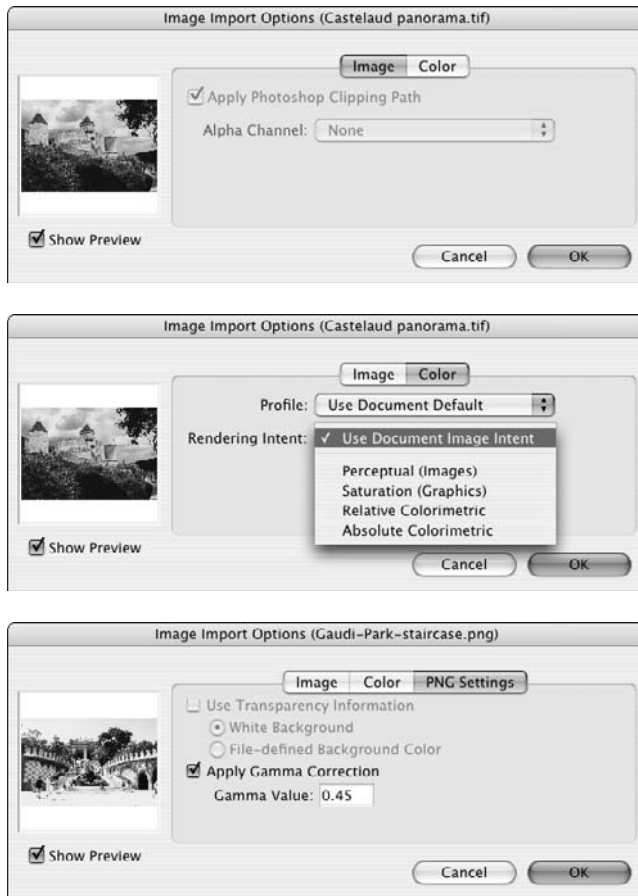


Figure 18-2: The Image, Color, and PNG Settings panes in the Image Import Options dialog box.

If you import a Photoshop, TIFF, or EPS file that contains an embedded clipping path, the Image pane lets you apply any embedded clipping path and/or alpha channel to the image in order to mask, or cut out, part of the image. (Otherwise, these options are grayed out.) Check the Apply Photoshop Clipping Path option to import the clipping path along with the image; select an alpha channel from the Alpha Channel pop-up menu to import the alpha channel along with the image. (Chapter 19 covers clipping paths in more detail.)

Color pane

In the Color pane, you can turn on color management for the image and control how the image is displayed. Check the Enable Color Management option to enable color management. This is an expert feature, so ask your production manager or service bureau whether you should make any adjustments here.

PNG Settings pane

Use the PNG Settings pane — available only if you place a PNG file — to use the transparency information in a PNG file, assuming it has a transparent background. You have two choices for controlling transparency handling: White Background and File-Defined Background. The former forces the transparent portion to display as white in InDesign; the latter uses whatever background color is specified in the PNG file itself.

This pane also lets you adjust the gamma value during import — an expert color-management feature you should leave alone unless told otherwise by a production manager or service bureau.

Import options for vector file formats

If you're importing vector files, selecting the Import Options check box will result in one of two dialog boxes appearing, depending on what the vector file type is. If you import older-version Illustrator or EPS files, you'll get the EPS Import Options dialog box; if you import PDF and newer-version Illustrator files, you'll get the Place PDF dialog box, which has two panes. (Both dialog boxes are shown in Figure 18-3.) No import options are available for Windows Metafile or Enhanced Metafile graphics.

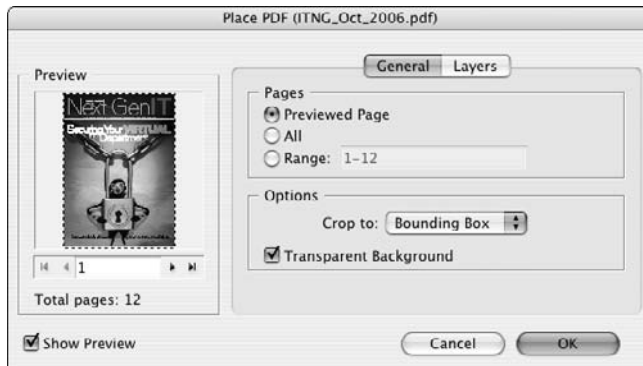
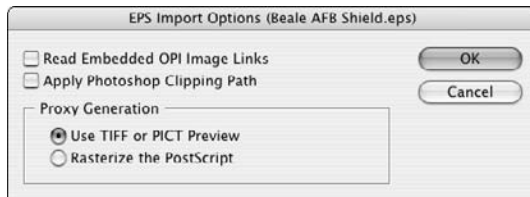


Figure 18-3:
The EPS
Import
Options and
Place PDF
dialog
boxes.



Illustrator CS through CS3 use PDF as their native file format, even though the filename extension is `.ai`, so InDesign detects these files as PDF files and provides the PDF options during import. In earlier versions of Illustrator, the native format was actually a variant of EPS.

EPS Import Options dialog box

Use this dialog box to import any clipping paths embedded in images that are in the EPS file. Check the Apply Photoshop Clipping Path option to enable this option.

Also, use this pane to control how the EPS file appears on-screen in InDesign. If you select the Use TIFF or PICT Preview option, InDesign will use the low-resolution proxy image embedded in the EPS file for display on-screen and print the graphic using the embedded high-resolution PostScript instructions. If you select the Rasterize the PostScript option, InDesign will convert the PostScript file into a bitmap image during import. There's rarely a reason to rasterize an imported EPS file — it just takes up some of your valuable time.

Place PDF dialog box

When you use the Place command to import a PDF file and you select the Show Import Options check box, the Place PDF file dialog box, shown in Figure 18-3, is displayed. It provides several controls for specifying how the file is imported. The General pane provides the following options:

- ✓ In the Pages section, select Previewed Page, All, or Range to determine which page(s) you want to import. You can change the previewed page by using the arrow buttons under the preview image at left or entering a specific page number in the field below the preview image. If you want to import a range, use commas to separate pages and a hyphen to indicate range; for example, **3, 5-9, 13** will import pages 3, 5 through 9, and 13.

When you place the PDF in InDesign, you'll get a separate loaded-graphic icon for each page, so as you place each page, a new loaded-graphic icon will appear for the next page, until there are no more to place. You can tell you're placing multiple pages because the loaded-graphics icon will have a plus sign in it.

- ✓ In the Options section, select one of the cropping options from the Crop To pop-up menu. If you choose Content, the page's bounding box or a rectangle that encloses all items, including page marks, is used to build the graphics frame. Choosing Art places the area defined by the file's creator, if any, as placeable artwork. For example, the person who created the file might have designated a particular graphic as placeable artwork. Choosing Crop places the area displayed and printed by Adobe



Acrobat. Choosing Trim places the graphic in an area equal to the final, trimmed piece. Choosing Bleed places the page area plus any specified bleed area. Choosing Media places an area defined by the paper size specified for the PDF document, including page marks.

- ✓ Also in the Options section, select the Transparent Background check box if you want the white areas of the PDF page to be transparent. Uncheck this option if you want to preserve the page's opaque white background.

Import options for placed InDesign files

When you import InDesign files to use as a graphic, you can use exactly the same options as for PDF files. The Place InDesign Document dialog box is identical to the Place PDF dialog box covered in the previous section, except of course, for the dialog box's name.

Working with image layers

InDesign lets you work with individual layers in some imported graphics. What that means is that you have more control over what displays because you can turn on or off individual layers. Of course, to use this capability, the source graphic must be constructed with multiple layers.

Use the Layers pane in the Image Import Options dialog box, the Place PDF, or Place InDesign Document dialog box to select which layer(s) you want visible in InDesign. (The Layers pane is available only if you place an Illustrator, PDF, or Photoshop graphic or InDesign file.) You will see a list of image layers. Any that have the eye icon will display in InDesign, and you can select or deselect layers by clicking the box to the right of the layer name to make the eye icon appear or disappear. (You cannot change their order — you'd need to go back to Photoshop or Illustrator and change the layer order there.) Figure 18-4 shows the Layers pane.

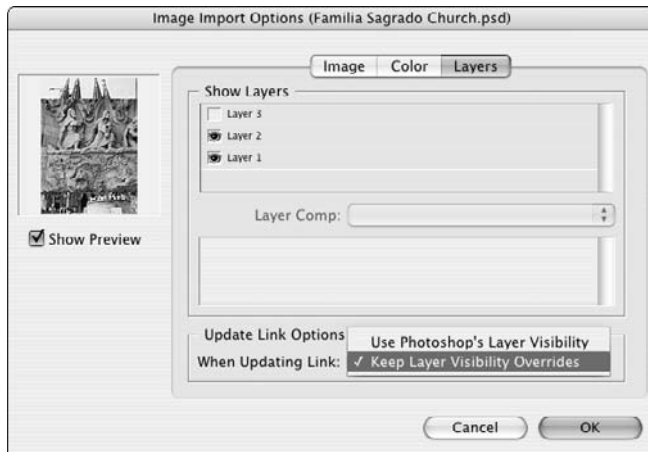
Note that you can adjust which layers are visible later on by selecting the graphic and then choosing Object⇨Object Layers Options.



Although you can save an image file in the TIFF format and preserve any layers, InDesign CS3 does not give you the ability to manage which layers you import from a TIFF file into InDesign.

There's also an option, in the When Updating Link pop-up menu, to control how changes to the file are handled in terms of layer management: If you choose Use Photoshop's Layer Visibility or Use Illustrator's Layer Visibility, InDesign will make all layers that are visible in Photoshop, InDesign or Illustrator visible when you update the link to the graphic from InDesign. If you choose Keep Layer Visibility Overrides in the When Updating Link pop-up menu, InDesign will import only the layers chosen in this dialog box if you later update the graphic in Photoshop, InDesign, or Illustrator.

Figure 18-4: The Layers pane of the EPS Import Options, Place PDF, and Place InDesign Document dialog boxes.



Using Other Ways to Import Graphics

If you want to specify custom import options for an imported graphics file, you must use the Place command. However, if you don't need this level of control, InDesign offers three other options for importing graphics:

- ✓ You can use your computer's Copy (File⇧Copy, or ⌘+C or Ctrl+C) and Paste (File⇧Paste, or ⌘+V or Ctrl+V) commands to move a graphics file between two InDesign documents or from a document created with another program into an InDesign document. If you copy an object in an InDesign document and then paste it into a different InDesign document, the copy retains all the attributes of the original, as well as the link to the original graphics file. Otherwise, a link between the original graphics file and the InDesign document is *not* established; the graphic becomes part of the InDesign document, as though you created it using InDesign tools.

- ✔ You can drag and drop graphics file icons from your computer's desktop into InDesign documents. A link between the original graphics file and the document is established, just as it would be if you had used the Place command.
- ✔ For Illustrator files, you can drag objects directly from Illustrator into InDesign. Each object becomes a separate, editable InDesign object, as though you had created it in InDesign. (And no links are established to the source file.)

If you use these methods to add a graphic to an InDesign document, some of the attributes of the original graphic may not survive the trip. The operating system, the file format, and the capabilities of the originating application all play roles in determining which attributes are preserved. If you want to be safe, use the Place command.

Chapter 19

Fitting Graphics and Setting Paths

In This Chapter

- ▶ Cropping and positioning graphics
 - ▶ Fitting graphics into frames and vice versa
 - ▶ Working with graphics in irregular shapes
 - ▶ Using clipping paths
-

After you import a graphic into an InDesign document, you can modify either the graphic or the frame that contains it. The most common actions you'll take are cropping, repositioning, and resizing. *Cropping* is a fancy term for deciding what part of the picture to show by altering the dimensions of the frame holding the graphic. *Repositioning* is essentially the same as cropping, except that you move the graphic within its frame. And if you want to get really fancy, you might work with clipping paths to create “masks” around picture portions or even cut the graphic into pieces.

Transformations such as resizing, flipping, rotating, and skewing that you're likely to apply to graphics use the same tools for graphics as for any InDesign objects. So I cover all these transformations in one place, in Chapter 9.



In almost every case, you select graphics with the Direct Selection tool to work with the graphic itself, rather than to the frame. If you use the Selection tool, the work you do will apply to the frame, as Chapter 12 explains.

Cropping and Repositioning

Remember, when you import a graphic using the Place command (File⇧Place, or ⌘+D or Ctrl+D) or by dragging a graphics file into a document window, the graphic is contained in a graphics frame — either the frame that was selected when you placed the graphic or the frame that was automatically created if a frame wasn't selected. The upper-left corner of an imported graphic is automatically placed in the upper-left corner of its frame.

The easiest way to crop a graphic is to resize the frame that contains it using the Selection or Position tool. To discover how to resize the frame, go to Chapter 9. Note that resizing the frame does *not* resize the graphic.

You can also click on a graphic with the Direct Selection tool, and then drag the graphic within its frame to reveal and conceal different parts of the graphic. For example, you could crop the top and left edges of a graphic by dragging the graphic above and to the left of its original position (in the upper-left corner of the frame).

You can also crop using the X+ and Y+ options in the Control panel and Transform panel; this is more precise than using the mouse. The advantage of moving the image within the frame is that you don't have to move the frame from its desired position in the layout.

If you want to *mask out* (hide) portions of an imported graphic, you have the option of using an irregular shape as the frame, a graphic's built-in clipping path (if it has one), or a clipping path you generated in InDesign, as covered later in this chapter.

Figuring out the Fitting Commands

If you've placed a graphic in a frame that's either larger or smaller than the graphic, you can use the Fitting options (available by choosing Object⇨Fitting or by using the appropriate iconic buttons in the Control panel) to scale the graphic to fit the frame proportionately or disproportionately or to scale the frame to fit the graphic. Another option lets you center the graphic in the frame. These are very handy, and a *lot* easier than trying to resize a graphic or frame to fit using the mouse or the Control panel.

Keep in mind that the fitting commands for graphics are available only if you've used the Selection or Position tool to select a graphic's frame. Here's a description of each of the six options:

- ✓ **Fit Content to Frame:** To scale a graphic to fill the selected frame, choose Object⇨Fitting⇨Fit Content to Frame or press Option+⌘+E or Ctrl+Alt+E. If the frame is larger than the graphic, the graphic is enlarged; if the frame is smaller, the graphic is reduced. If the graphic and the frame have different proportions, the graphic's proportions are changed so that the image completely fills the frame — this can distort the graphic's appearance.

- ✓ **Fit Frame to Content:** To resize a frame so that it wraps snugly around a graphic, choose Fit Frame to Content or press Option+⌘+C or Ctrl+Alt+C. The frame will be enlarged or reduced depending on the size of the graphic, and the frame's proportions will be changed to match the proportions of the graphic.
- ✓ **Center Content:** To center a graphic in its frame, choose Center Content or press Shift+⌘+E or Ctrl+Shift+E. Neither the frame nor the graphic is scaled when you center a graphic.
- ✓ **Fit Content Proportionally:** To scale a graphic to fit in the selected frame while maintaining the graphic's current proportions, choose Object⇨Fitting⇨Fit Content Proportionally or press Option+Shift+⌘+E or Ctrl+Alt+Shift+E. If the frame is larger than the graphic, the graphic is enlarged; if the frame is smaller, the graphic is reduced. If the graphic and the frame have different proportions, a portion of the frame background will show above and below or to the left and right of the graphic. If you want, you can drag frame edges to make the frame shorter or narrower and eliminate any portions of the background that are visible.
- ✓ **Fill Frame Proportionally:** To resize a frame to fit the selected graphic, choose Object⇨Fitting⇨Fill Frame Proportionally or press Option+Shift+⌘+C or Ctrl+Alt+Shift+C. This guarantees that there will be no space between the graphic and the frame. (The Fit Frame to Content option can result in such space at the bottom and/or right sides of a graphic.)
- ✓ **Frame Fitting Options:** To control the default fitting for newly placed graphics, use the new Frame Fitting Options dialog box, shown in Figure 19-1. Here you can set the amount of crop, choose the control point for the imported graphic (see Chapter 1), and automatically apply your choice of the Fit Content to Frame, Fit Content Proportionally, and Fill Frame Proportionally options.



For frames with strokes, the Fitting options align the outer edge of a graphic with the center of the stroke. A stroke obscures a strip along the graphic's edge that's half the width of the stroke. The wider the stroke, the more of the graphic that gets covered up.

You can also use the frame-fitting iconic buttons in the Control panel, shown in Figure 19-2. But note that these may not display in your Control panel; by default, InDesign shows them only if your monitor is set to a resolution whose width is 1,280 or more pixels. You can make room for them at smaller resolutions by customizing the Control panel display: choose Customize from the panel's flyout menu and then deselect some of the Object controls to make room.

Figure 19-1:
The Frame Fitting Options dialog box lets you set the default behavior for newly imported graphics.

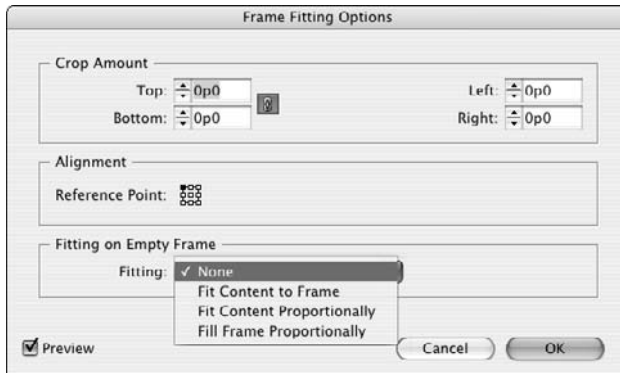


Figure 19-2:
The frame-fitting iconic buttons in the Control panel.



Working with Graphics in Irregular Shapes

Although most graphics you use will be placed in rectangular frames, InDesign does give you other choices:

- ✓ You can select any type of frame — oval or polygonal, not just rectangular — to place or copy your graphic into.
- ✓ You can draw your own shape using the Pencil or Pen tool and then place or copy your graphic into it. When you create the free-form shape, make sure that the default color for the Pen tool is set to None so that the shape you create is transparent. Otherwise, the colored area in the shape will obscure the graphic behind it.



The Pen tool lets you create one shape at a time. The Compound Paths command lets you combine multiple shapes to create more complex objects. For example, you can place a small circle on top of a larger circle, and then use the Compound Paths command to create a doughnut-shaped object. (This is an expert feature not covered in this book.)



If you copy the graphic into a frame or shape, you must use the Paste Into command (Edit⇨Paste Into, or Option+⌘+V or Ctrl+Alt+V) to place the copied graphic inside the selected shape, rather than on top of it.

- ✓ You can use a clipping path that was defined in the graphic itself when it was created or a clipping path that was created in InDesign.

So what is a clipping path, anyway? A *clipping path* is used to mask certain parts of a graphic and reveal other parts; it's basically an invisible outline placed in the graphic that InDesign can then work with. For example, if you want to create a silhouette around a single person in a crowd, open the file in an image-editing program such as Photoshop, and then create and save a clipping path that isolates the shape of the person. (You can also erase everything except the person you want to silhouette; this can be time-consuming, and if you want to reveal other parts of the graphic later, you're out of luck.) TIFF, Photoshop EPS, and Photoshop-native (.PSD) files can have embedded clipping paths.

Regardless of the method you use to clip an imported graphic, you can modify a clipping path by moving, adding, deleting, and changing the direction of anchor points and by moving direction lines.

You can convert a clipping path — whether imported or created in InDesign — to a frame by choosing Convert Clipping Path to Frame for a selected object using the contextual menu (right-click or Control+click the object).

See the *Photoshop For Dummies* series (Wiley Publishing) for more on creating clipping paths in Photoshop.

Using a graphic's own clipping path

In an ideal world, any graphics that you want to have fit in an irregular shape will come with their own clipping paths. In that wonderful situation, you would first be sure to import the clipping path when you place the graphic and then use InDesign's Text Wrap panel to access that clipping path.

The steps are easy:

- 1. Be sure to select the Show Import Options check box in the Place dialog box (File⇨Place, or ⌘+D or Ctrl+D) when you import the graphic and select the Apply Photoshop Clipping Path option in the Image Import Options dialog box.**
- 2. Open the Text Wrap panel (Window⇨Text Wrap, or Option+⌘+W or Ctrl+Alt+W).**

3. Select the graphic.
4. Click the **Wrap Around Object Shape** iconic button (the third one from the left) at the top of the Text Wrap panel.
5. If you want, adjust the space between the surrounding text and the obstructing shape by typing values in the **Top Offset** field.
6. Now select the clipping source from the **Type pop-up menu in the Contour Options** section of the Text Wrap panel. Choose from two relevant options:
 - Alpha Channel uses the image's alpha channel, if any, to create a wrapping boundary. (An *alpha channel* is another type of clipping path and is also created in the source program such as Photoshop.)
 - Photoshop Path uses the image's clipping path, if any, to create a wrapping boundary. Use the Path pop-up menu to select which path to use, if your image has more than one embedded clipping path.

See Chapter 12 for the basics of text wraps.

Creating a clipping path in InDesign

If you import a graphic that doesn't have a clipping path, you have two sets of options for creating a clipping path.

The easiest is to use the Text Wrap panel as described in the previous section but to instead choose one of the following options from the Type pop-up menu:

- ✓ Detect Edges tries to determine the graphic's outside boundary by ignoring white space — you would use this for bitmapped images that have a transparent or white background.
- ✓ Same as Clipping uses the clipping path for the graphic created in InDesign — you would use this when the desired clipping path can't be created through the Detect Edges option. (I cover this method of clipping-path creation shortly.)

You can further modify the clipping path by selecting the graphic with the Direct Selection tool. The text-wrap boundary appears as a blue line — you can make the boundary easier to select by setting offsets in the Text Wrap pane, which moves the boundary away from the frame edge.

A slightly more difficult way to create a clipping path — but one that gives you more control — is to use the Clipping Path command (Object⇨Clipping Path⇨Options, or Option+Shift+⌘+K or Ctrl+Alt+Shift+K) to generate one automatically:

1. Select the graphic to which you want to add a clipping path.

It's best to use the Direct Selection tool, so that you can see the clipping path within the frame as you work.

2. Choose Object⇨Clipping Path⇨Options, or press Option+Shift+⌘+K or Ctrl+Alt+Shift+K.

The Clipping Path dialog box appears, as shown in Figure 19-3.

3. To have InDesign detect the likely boundary of the image, as opposed to a white or other light background, choose Detect Edges from the Type pop-up menu.

You can use the other options to select Alpha Channel or Photoshop Path as the clipping path for graphics that have one or more of these. (InDesign can only use one alpha channel or Photoshop path as the clipping path, so use the Path pop-up menu to choose the one you want.)

4. Type a value in the Threshold field or click and drag the field's slider to specify the value below which pixels will be placed outside the clipping path shape (that is, pixels that will become transparent).

Pixels darker than the Threshold value remain visible and thus are inside the clipping path shape. The lowest possible Threshold value (0) makes only white pixels transparent. As the value gets higher, less of the graphic remains visible. The lightest areas are removed first, then mid-tones, and so on. (Select the Preview option to see the results of your changes without closing the dialog box.)

5. Type a value in the Tolerance field.

This value determines how closely InDesign looks at variations in adjacent pixels when building a clipping path. Higher values produce a simpler, smoother path than lower values. Lower values create a more complicated, more exact path with more anchor points.

6. If you want to enlarge or reduce the size of the clipping path produced by the Threshold and Tolerance values, type a value in the Inset Frame field.

Negative values enlarge the path; positive values shrink it. (The Inset Frame value is also applied to the path's bounding box.)

7. Select the Invert option to switch the transparent and visible areas of the clipping path produced by the Threshold and Tolerance values.

8. If you want to include light areas in the perimeter shape InDesign generates based on the Threshold and Tolerance values, select the **Include Inside Edges** option.

For example, if you have a graphic of a doughnut and you want to make the hole transparent (as well as the area around the outside of the doughnut), click Include Inside Edges. If you don't click Include Inside Edges, InDesign builds a single shape (in the case of a doughnut, just the outside circle). The portion of the graphic in the shape remains visible; the rest of the graphic becomes transparent.

9. Select the **Restrict to Frame** option if you want InDesign to generate a clipping path from just the portion of the graphic visible in the graphic frame, as opposed to the entire graphic (such as if you cropped the graphic).
10. Select the **Use High Resolution Image** option if you want InDesign to use the high-resolution information in the original file instead of using the low-resolution proxy image.

Even though using the high-resolution image takes longer, the resulting clipping path is more precise than it would be if you didn't check Use High Resolution Image.

11. When you've finished specifying clipping path settings, click **OK** to close the dialog box and apply the settings to the selected graphic.

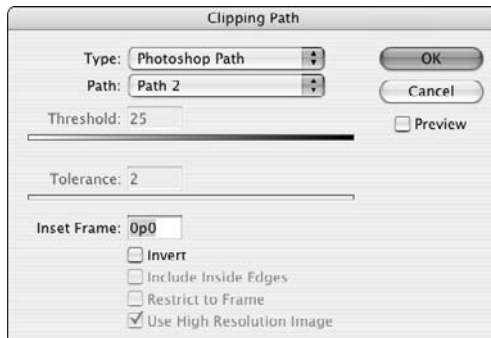


Figure 19-3:
The Clipping
Path dialog
box.



If you use the Clipping Path command to generate a clipping path for a graphic that has a built-in clipping path, the one that InDesign generates replaces the built-in path.

Figure 19-4 shows a graphic before and after a clipping path was applied to it using the Clipping Path command. At left is a graphic of coastal France with a graphic of a glider superimposed. At right is the same set of graphics, but with a clipping path applied to the glider so the outside area is masked out, making it transparent.

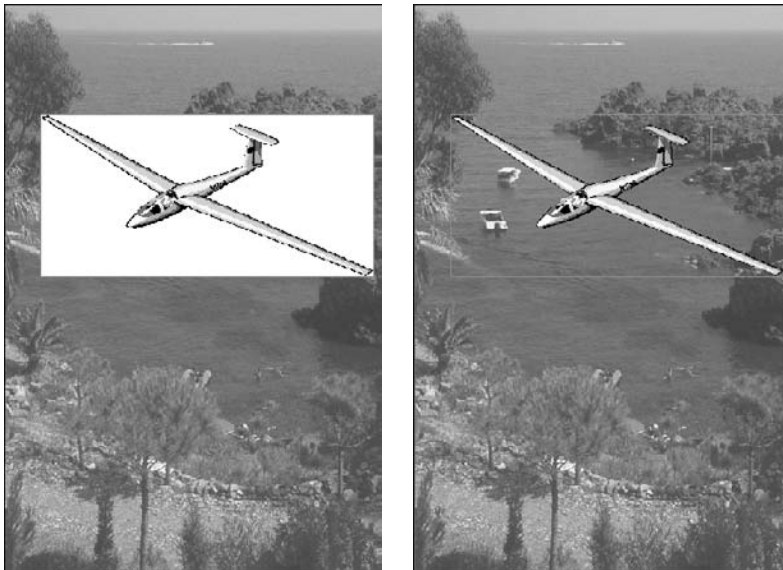


Figure 19-4:
A superimposed image before (left) and after applying a clipping path (right).



The Clipping Path command works very well for images that have a white or light background but no clipping path. It's less useful for graphics with backgrounds that contain a broad range of intermingling values.

You can remove a clipping path by choosing None as the Type in the Clipping Path dialog box. You can also select a different path — Detect Edges, Alpha Channel, Photoshop Path, or User-Modified Path — than was selected previously if you decide to change the current clipping path.

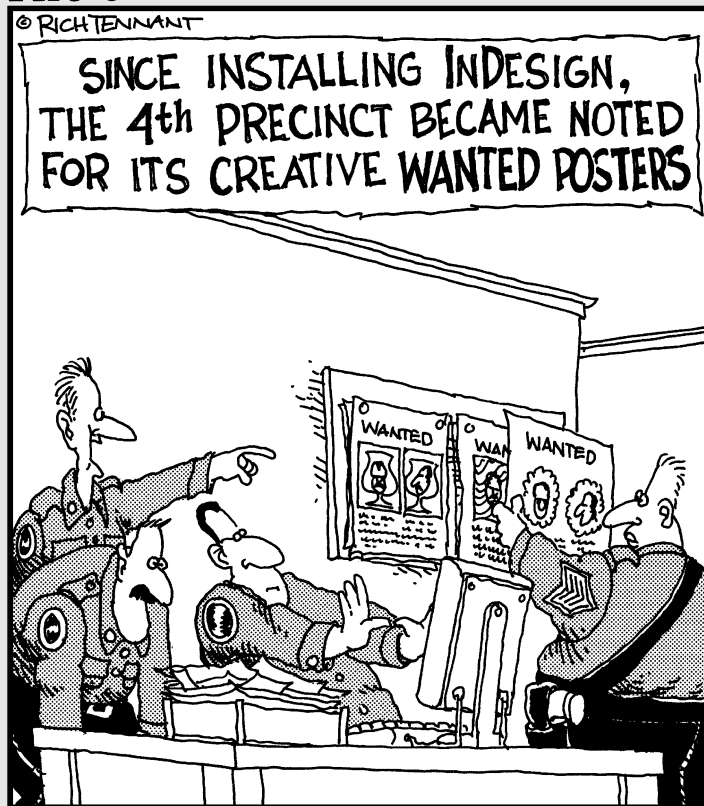
InDesign lets you convert a clipping path into a frame, so you get the exact shape as your clipping path to use as a container or silhouette in your layout. Select the clipping path with the Direct Selection tool and choose Object⇨Clipping Path⇨Convert Clipping Path to Frame. It's as easy as that!

Part VI

Getting Down to Business

The 5th Wave

By Rich Tennant



"Ooo-look! Sgt. Rodriguez has the felon's
head floating in a teacup!"

In this part . . .

Microsoft Word, move over. It used to be that a word processor did all the business-y stuff like footnotes, tables, tables of contents, indexing, and mail-merge. Not anymore. Over the years, like a slow-moving movie monster nonetheless catching up with the terrorized teens, more and more of these business functions have found their way into InDesign. This version has even *more* such features, such as text variables.

This part shows you how to suit up your documents. But relax — you'll still be a designer at heart!

Chapter 20

Working with Tabs and Tables

In This Chapter

- ▶ Setting tabs
 - ▶ Creating tables
 - ▶ Adjusting tables
 - ▶ Formatting tables
 - ▶ Using table and cell styles
 - ▶ Converting text to tables, and vice versa
-

Perhaps the most common business-oriented formatting done in InDesign involves tabular material, whether financial tables or simple comparative feature lists. InDesign provides two methods for creating tabular material: old-fashioned tabs and more sophisticated tables. Although you can create tables with tabs, you have less control over the formatting and thus can create just basic tables when you use tabs. On the other hand, for simple tables, using tabs is often the faster method. So don't feel you should never use tabs — but do be sure that when you mix methods that you don't let visual consistency suffer as a result.

Tabs and tables in InDesign work somewhat like the same functions in Microsoft Word, so if you're familiar with Word's tabs and tables, it'll be a quick adjustment to InDesign's, at least for the basic capabilities.

Setting Tabs

To set tabs in InDesign, you use the Tabs panel, which floats above your text so that you can keep it open until you're finished experimenting with tabs. To open the Tabs panel, choose **Type**⇨**Tabs** or press **Shift+⌘+T** or **Ctrl+Shift+T**. Figure 20-1 shows the Tabs panel along with a simple table created using one tab stop.



In InDesign CS3, you can no longer access the Tabs panel by choosing **Window**⇨**Type & Tables**⇨**Tabs**.



You can also set up tabs in the Tabs pane of the New Paragraph Styles and Paragraph Style Options dialog boxes, so tabs are consistently applied to all paragraphs. Chapter 14 covers styles in more detail.

Four buttons — Left, Center, Right, and Align On — on the Tabs panel let you control how the text aligns with the tab you're creating. The Align On option is usually used for decimal tabs, which means that a period in the text aligns on the tab stop. But you can align on any character, not just periods — simply specify the align-on character in the Align On field. (If you enter nothing in the Align On field, InDesign assumes you want to align to periods.) If the Align On field is not visible in the Tabs panel, just widen the panel by dragging one of its sides so the field displays.

The X: field of the Tabs panel lets you specify a position for a new tab stop. You can type a value in this field in 0.01-point increments, and then press Shift+Enter or Shift+Return to create a tab. InDesign positions tabs relative to the left edge of the text frame or column.

Rather than typing values in the X: field, you can position tabs by clicking at the desired location on the ruler at the bottom of the Tabs panel. You can also drag tab stops within the ruler to change their position. And you can reposition left and right indents and indent hangs using the arrow sliders on the tab ruler. (These have the same effects as changing indents using the Paragraph panel or Paragraph Styles panel, as explained in Chapter 15.)



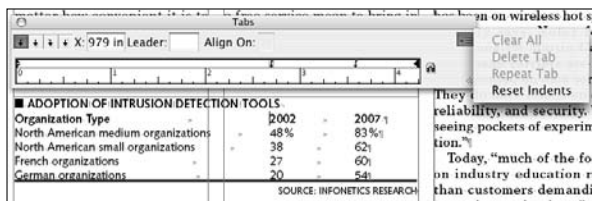
To have the Tabs panel “snap” to your text frame, so you can see exactly where the tab stops will be, click the Position Panel Above Text Frame iconic button (the magnet icon).



If you need a tab flush with the right margin — for example, to position a dingbat at the end of the story — press Shift+Tab. There's no need to use the Tabs panel.

Figure 20-1:

The Tabs panel, its flyout menu, and a table created using tab settings.



InDesign lets you specify up to eight characters, including special characters that will repeat to fill any white space. These repeating characters are called *leaders*. When you set a leader for a tab stop, the leaders actually fill any space prior to that tab stop (between the previous text and the tab location). To spread out the leader characters, type spaces between the characters you enter. Don't enter spaces before and after a single character though, as that will result in two spaces between the characters when the pattern repeats (unless that's the look you're going for).

In addition to setting tabs in the Tabs panel, InDesign provides four additional options through its flyout menu: Clear All and Repeat Tab.



- ✓ The Clear All command deletes any tabs you've created, and any text positioned with tabs reverts to the position of the default tab stops. (You can delete an individual tab stop by dragging its icon off the ruler.)
- ✓ The Delete Tab command deletes the currently selected tab (just click it in the tab ruler).
You can also delete tabs by dragging them off the tab ruler using the mouse.
- ✓ The Repeat Tab command lets you create a string of tabs across the ruler that are all the same distance apart. When you select a tab on the ruler and choose this command, InDesign measures the distance between the selected tab and the previous tab (or, if it's the first tab on the ruler, the distance between the selected tab and the left indent/text inset). The program then uses this distance to place new tabs, with the same alignment, all the way across the ruler. InDesign repeats tabs only to the right of the selected tab, but it inserts tabs between other tab stops.
- ✓ The Reset Indents command removes any changes to the left indent, right indent, or indent hang settings defined in the paragraph style currently applied to the text.

Setting Up Tables

You can create tables using tabs. But the more complex the table, the more work that requires. So make your life easier and use InDesign's table editor, which lets you specify almost any attribute imaginable in a table through the Table panel and the Table menu.

InDesign lets you import tables from Microsoft Word, RTF, and Microsoft Excel files, including some of their cell formatting. Likewise, you can convert their tables to tabbed text by using the options in the Import Options dialog box that is accessible when you place a file through the Place dialog box (File→Place, or ⌘+D or Ctrl+D), as covered in Chapter 12.

To create a table in InDesign, you first create or select a text frame with the Type tool and then choose **Table**⇨**Insert Table** or press **Option+Shift+⌘+T** or **Ctrl+Alt+Shift+T**. If you select an existing text frame, the table will be inserted at the cursor's location in the existing text.

That produces the Insert Table dialog box, where you type the number of body rows and columns and the number of header and footer rows. (Header and footer rows repeat on each page for tables that go across multiple pages.) Click **OK** to have InDesign create the basic table, which will be set as wide as the text frame. The depth will be based on the number of rows, with each row defaulting to the height that will hold 12-point text.

You can also apply a table style to the new table by selecting one from the **Table Style** pop-up menu. I cover how to create these styles later in this chapter.

With the basic table in place, you now format it using the **Table** panel and the **Table** menu. In both, you can increase or decrease the number of rows and columns, set the row and column height, set the text's vertical alignment within selected cells (top, middle, bottom, and justified), choose one of four text-rotation angles, and set the text margin within a cell separately for the top, bottom, left, and right. Note that all the **Table** panel's options affect only the currently selected cells, except for the **Number of Rows** and **Number of Columns** fields. Figure 20-2 shows the **Table** panel and its flyout menu. Figure 20-3 shows an example table created using these tools.

**TIP**

If you have a smallish monitor, set at 1024 by 768 pixels — the norm for a 17-inch display — the **Table**, **Table Styles**, and **Cell Styles** panels are shoved to the bottom of the panel dock, and, when they're selected, the only thing you'll see is their panel tab and flyout menu icon. You have a few choices: Shorten other panel groups in the dock to make room for them, remove other panel groups to make room for them, or drag them out of the dock and make them floating.

**REMEMBER**

You set cell text's horizontal alignment using the paragraph formatting controls covered in Chapter 15. You can apply character formatting to cell text as described in Chapter 16. You can also apply tabs within cells using the **Tabs** panel covered earlier in this chapter.

**NEW FEATURE**

To add items to a table, you can type text in any cell, paste text or graphics into a cell, or place text or graphics into a cell by choosing **File**⇨**Place** or pressing **⌘+D** or **Ctrl+D**.

InDesign CS3 lets you paste tabbed text into tables. The tabs are retained, and all the text is pasted into the same cell.

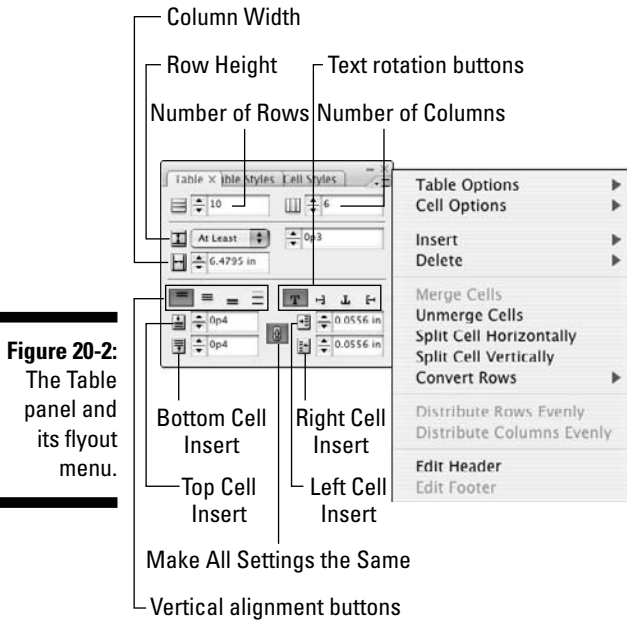


Figure 20-2: The Table panel and its flyout menu.

Figure 20-3: An example table created with the table tools.

■ WHERE HOT SPOTS ARE AVAILABLE		2001	2002	2003	2004	2005
Airports		85	152	292	378	423
Hotels		569	2,274	11,687	22,021	23,663
Retail Outlets		474	11,109	50,287	82,149	85,567
Enterprise Guesting Areas		84	624	1,762	3,708	5,413
Stations and Ports		—	88	623	2,143	3,887
Community Hot Spots		2	266	5,637	20,561	30,659
Others		—	240	790	1,526	2,156
Total Market		1,214	14,752	71,079	132,486	151,768

SOURCE: GARTNER

Adjusting tables

InDesign lets you add and delete rows and columns, as well as split and join cells using the Insert, Delete, Merge, and Split commands in the Table menu and in the Table panel’s flyout menu. You can also select rows, columns, and entire tables using the Table menu. There are also several shortcuts, shown in Table 20-1, to speed things along if you are a keyboard-oriented person.

These commands work intuitively, so I won’t bore you with detailed explanations here. For example, to delete a row, select it or a cell within it using the

Type tool, and then choose **Table**⇨**Delete**⇨**Row**. To split a cell vertically, select the cell and choose **Table**⇨**Split Cell Vertically**. You get the idea.

Table 20-1		
Table-Editing Shortcuts		
<i>Command</i>	<i>Macintosh Shortcut</i>	<i>Windows Shortcut</i>
Select cell	⌘+/	Ctrl+/,
Select row	⌘+3	Ctrl+3
Select column	Option+⌘+3	Ctrl+Alt+3
Select table	Option+⌘+A	Ctrl+Alt+A
Insert cell	Option+⌘+9	Ctrl+Alt+9
Insert row	⌘+9	Ctrl+9
Delete cell	Shift+Backspace	Shift+Backspace
Delete row	⌘+Backspace	Ctrl+Backspace

Formatting tables

For more sophisticated table attributes, use the Table Options dialog box and its five panes (choose **Table**⇨**Table Options** and then the desired pane from the submenu. To go straight to the Table Setup pane, you can also just press **Option+Shift+⌘+B** or **Ctrl+Alt+Shift+B**.) You'll see the Table Setup pane, shown in Figure 20-4. If you want to go straight to one of the four other panes, you can do so by choosing the desired pane in the submenu after choosing **Table**⇨**Table Options**.



When formatting tables, take advantage of the Preview option in most dialog boxes to see the effects of your changes before committing to them.



If you select more than one cell — meaning the entire cell, not just some of its contents — the Control panel's options change to display many of the controls available in the Table panel, as well as some cell-oriented controls such as setting cell boundary line weights and line types.

Here are some of the basics to keep in mind:

- ✓ The Table Setup pane lets you change the number of rows and columns, as well as footer rows and columns. You also can specify the table

border, color, line type, and even tint. Use the Table Spacing options to have space automatically added before and after a table that is in the same text frame as other text.

- ✓ The Row Strokes pane, shown in Figure 20-5, lets you decide how often rows have an alternating pattern of strokes applied to them. For example, you may want every third row to have a thicker stroke than the first and second rows, because each set of three rows is related to each other and the third row marks the end of that set. You choose how many rows you want the special stroke to skip before being applied in the Alternating Pattern pop-up menu, and then use the rest of the controls to choose the stroke weight, color, type, and so on.
- ✓ The Column Strokes pane works just like the Row Strokes pane, except it lets you alternate the strokes across columns rather than rows.
- ✓ The Fills pane works like the Row Strokes pane and Column Strokes pane, except that it applies a fill to the cells in the specified series of rows or columns. The reason that there is just one pane for fills but two for strokes is that you can't have both row fills and column fills automatically applied to the same table — that would usually make for a hard-to-read checkerboard. Of course, you could use horizontal fills to accentuate rows and use strokes on columns to help keep them visually separate.
- ✓ The Headers and Footers pane lets you change the number of header and footer rows — just like the Table Setup pane — but it also lets you control how often the header and/or footer rows repeat: Every Text Column, Once Per Frame, or Once Per Page.

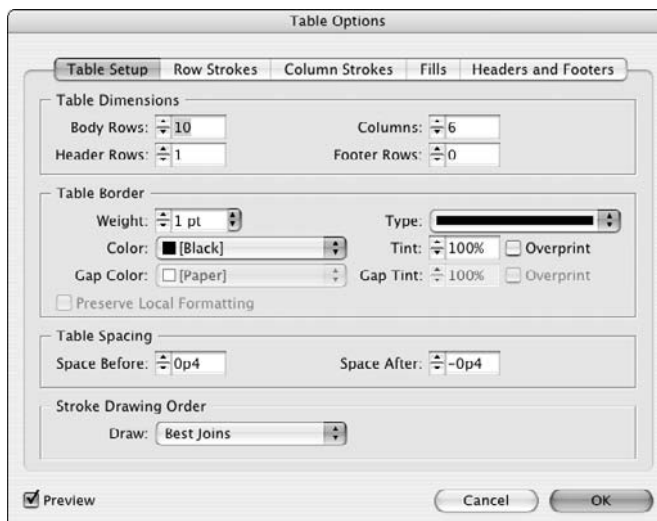
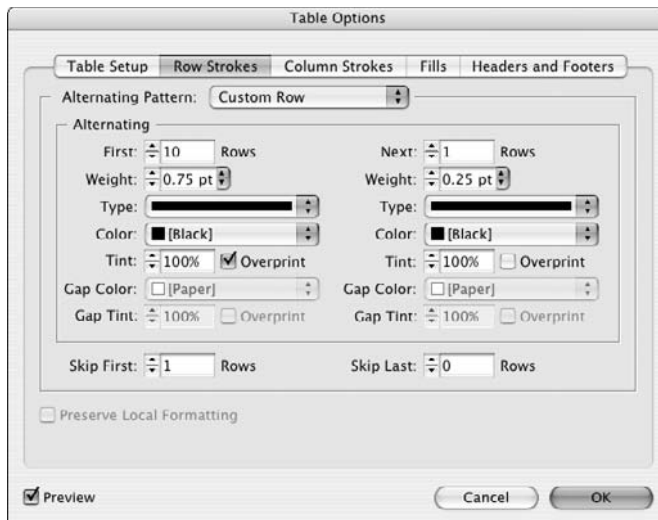


Figure 20-4:
The Table Setup pane of the Table Options dialog box.

Figure 20-5:
The Row
Strokes
pane of the
Table
Options
dialog box.



InDesign also provides formatting controls over cells, using the Cell Options dialog box. (Choose **Table**⇨**Cell Options** and then one of the four desired panes: **Text**, **Strokes and Fills**, **Rows and Columns**, and **Diagonal Lines**. You can go straight to the **Text** pane by pressing **Option+⌘+B** or **Ctrl+Alt+B**.) After you selected the cells you want to format, use the various panes as desired:

- ✓ The **Text** pane works very much like the **General** pane of the **Text Frame Options** dialog box (covered in Chapter 15). Here, you set how far text is inset from the cell boundaries, how text is vertically aligned within the cell, and where the text baseline begins within the cell. Unique to cells, you can also specify whether the cell grows to fit the text automatically (by unchecking **Clip Contents to Cell**) and the degree of text rotation (0, 90, 180, and 270 degrees).
- ✓ The **Strokes and Fills** pane, shown in Figure 20-6, lets you set the stroke and fill for selected cells. You can select which cell boundaries to apply a stroke to, by selecting the sides from the preview image at the top of the pane and then choosing the desired options. You can also set the desired fill color and tint.
- ✓ The **Rows and Columns** pane lets you set the row height, including its maximum for rows that are allowed to expand automatically as specified in the **Text** pane, as well as the column width. You also can specify which rows must be kept together and if certain rows should start at a new page, frame, or column.



You can also adjust column and row heights by dragging on the row and column boundaries with the mouse.

- ✓ The Diagonal Lines pane lets you place three types of diagonal lines within cells — upper left to lower right, lower right to upper left, or both — and then specify the stroke weight, type, color, and tint. You can also choose whether the diagonal lines overprint the cell contents or vice versa. To remove a diagonal line, just click the No Diagonal Lines iconic button.

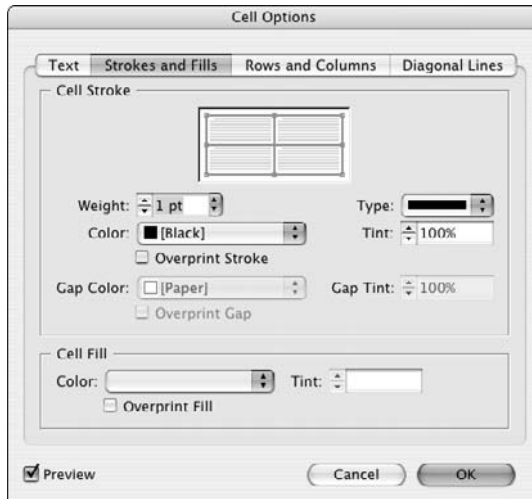


Figure 20-6:
The Strokes
and Fills
pane of the
Cell Options
dialog box.

Using table and cell styles



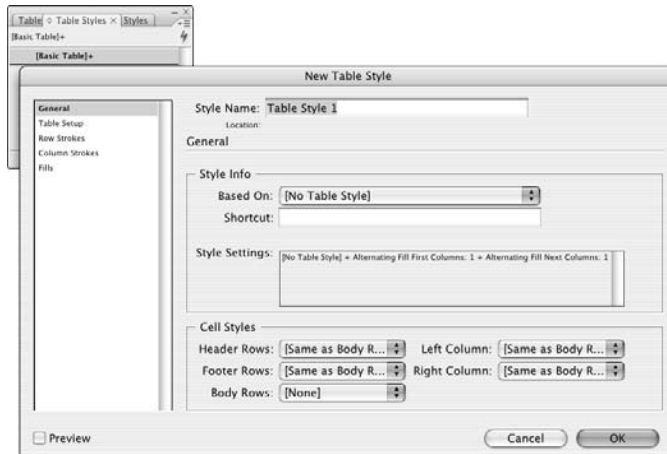
To make it easy to apply and update table formatting across a document, InDesign CS3 adds table and cell styles. They work like paragraph, character, and object styles, taking the table formatting features covered earlier in this section and bringing them together into the New Table Style and New Cell Style dialog boxes.

To work with table styles, open the Table Styles panel by choosing Window⇨Type & Tables⇨Table Styles. To work with cell styles, open the Cell Styles panel by choosing Window⇨Type & Tables⇨Cell Styles. Choose New Table Style or New Cell Style from the appropriate panel's flyout menu, and then use the various panes to specify the desired formatting. The panes, and their options, are the same as described in the previous section, "Formatting tables." Figure 20-7 shows the New Table Style dialog box's General pane.



Whether creating a new table style or a new cell style, the easiest method is to format an existing table or cell the way you want it, select it, then create a new table or cell style — InDesign will pick up the existing formatting for the new style. Otherwise, you'll have to specify everything in the New Table Style or New Cell Style dialog box, where it's harder to see the effects of your settings. (Even if you enable the Preview option, the dialog boxes are fairly large and tend to obscure most of your document.)

Figure 20-7:
The General
pane of
the New
Table Style
dialog box.



There are a few notes about creating table and cell styles — in the General pane of the New Table Style and New Cell Style dialog boxes — that you should know before getting too far into them:

- ✔ You give each style its own name. Choose names that will make sense a week or a month later, so you know what they are meant to be used for!
- ✔ You can base a new table style on an existing one, so changes to the parent style are automatically reflected in the children styles based on it.
- ✔ You can assign a keyboard shortcut to styles you use frequently.

When creating table styles, you can also have the table style automatically apply the cell styles of your choosing to the following table elements: header rows, footer rows, body rows, the leftmost column, and the rightmost column.

When creating cell styles, you can choose a paragraph style to be automatically applied to text in cells using the style.

To apply styles to selected tables or cells, just choose the desired style from the Table Style or Cell Style panel. To override existing formatting, use the options indicated for paragraph and character styles described in Chapter 13.

Modifying and managing table and cell styles

Modifying styles is easy: Double-click the style name in the Table Styles or Cell Styles panel. This opens the Table Style Options or Cell Style Options dialog box, which is identical to the New Table Styles or New Cell Styles

dialog box explained in the previous section. Make your changes, click OK, and your styles and all tables and cells using them are instantly updated!

InDesign also lets you manage your styles, such as creating groups of styles to make it easier to find relevant ones, and bringing in styles from other documents. Because these features work the same for paragraph and character styles as well, I've covered these features in Chapter 14.

Converting Tabs to Tables (and Back)

Often, you'll have a table done using tabs — whether imported from a word processor or originally created in InDesign with tabs — that you want to convert to a real InDesign table. That's easy. Select the tabbed text you want to convert using the Type tool and choose **Table⇨Convert Text to Table**.

In the Convert Text to Table dialog box, you can choose a Column Separator (Tab, Comma, Paragraph, or a text string you type in the field) or a Row Separator (same options). Although most textual data uses tabs to separate columns and paragraphs to separate rows, you may encounter other data that uses something else. For example, spreadsheets and databases often save data so that commas, rather than tabs, separate columns. That's why InDesign lets you choose the separator characters before conversion.

During the conversion, InDesign formats the table using the standard settings, using the current text formatting and the default cell insets and stroke types. You can then adjust the table using the tools covered earlier in this chapter. Note that the conversion treats all rows as body rows.

You can also convert a table to text by selecting multiple cells or an entire table, as described earlier, and choosing **Table⇨Convert Table to Text**. InDesign presents the same options as it does in the Convert Text to Table dialog box, so you can determine how the converted data appears.

Chapter 21

Working with Footnotes, Indexes, and TOCs

In This Chapter

- ▶ Adding footnotes
 - ▶ Generating tables of contents
 - ▶ Creating indexes
-

Many business documents — books, reports, white papers, and so on — use features traditionally associated with academic book publishing: footnotes to cite sources, indexes to provide a map to specific content's location in the document, and tables of contents (TOCs) to provide an overview of the document's structure and contents.

When you're working on any type of document — a report, a magazine, a textbook — you can easily spend more time manually creating tables of contents, keeping footnotes updated, and laboriously managing indexes than you spend designing the publication. InDesign helps reduce this labor while also ensuring that your footnotes, indexes, and tables of content stay automatically updated as your document is revised.



You can extend the power of these tools to book-length projects composed of multiple InDesign documents (covered in Chapter 23), creating consistent indexing and tables of contents in one fell swoop.

Adding Footnotes

Many documents, including academic and technical documents, use footnotes. InDesign lets you add footnotes to your document with very little fuss.

You can import footnotes from Microsoft Word files (see Chapter 12), or you can add footnotes directly in InDesign. With the text-insertion cursor in your text where you want the footnote marker to appear, choose **Type**⇨**Insert Footnote** to add a footnote to the bottom of the column that contains the footnote marker, as Figure 21-1 shows. You need to manually enter the text that will go with each numbered footnote, but InDesign updates the footnote numbering as you add and delete footnotes.



You cannot insert footnotes into tables. But you can simulate footnotes by adding a superscripted footnote character in the table text and typing your footnote text below the table — note this “footnote” is not linked to the text, will not renumber automatically as a real footnote would, and cannot be formatted with InDesign’s footnote formatting controls.

You can control much of the appearance of footnotes by choosing **Type**⇨**Document Footnote Options** to open the Footnote Options dialog box, shown in Figure 21-2.

The **Numbering and Formatting** pane controls the formatting of the footnote text and footnote character in the current InDesign document. The **Layout** pane controls the placement of the footnote relative to the rest of the document.

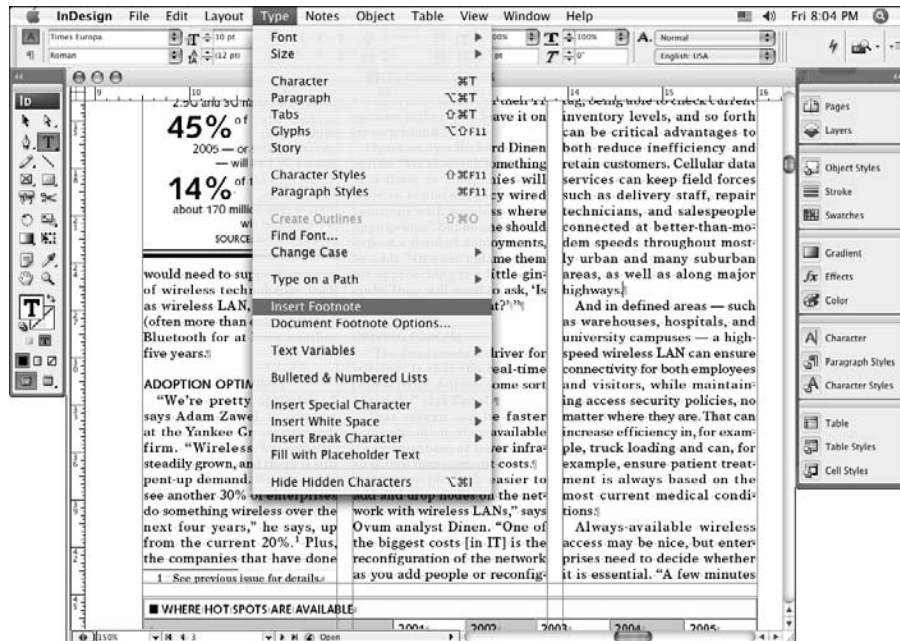
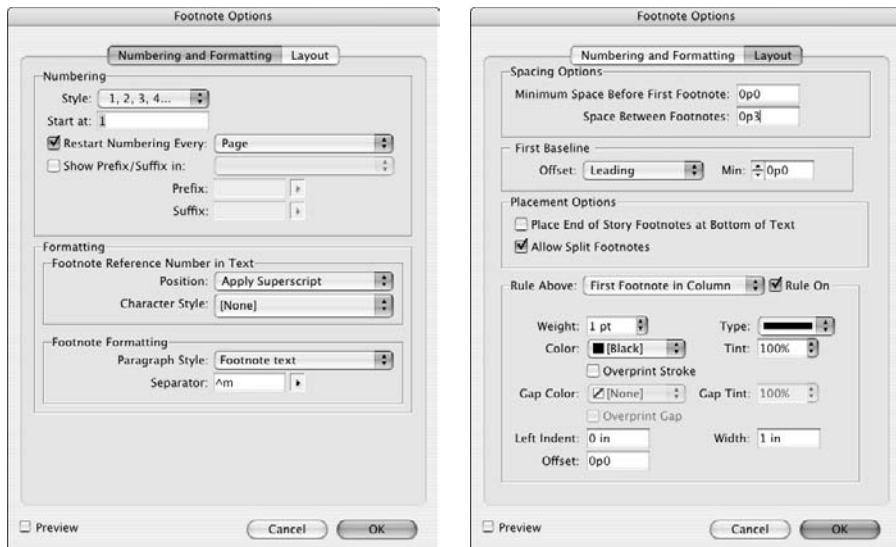


Figure 21-1:
Inserting a
footnote.

Figure 21-2:
The Footnote Options dialog box contains two panes: Numbering and Formatting and Layout.



Among the features you should note in the Numbering and Formatting pane are

- ✔ Choose the numbering style — such as 1, 2, 3, 4 ... or I, ii, iii, iv ... — via the Style pop-up menu.
- ✔ Control whether the footnote numbers start anew (such as at the beginning of a section) or continue from the previous number via the Start At field.
- ✔ Control whether numbering automatically resets every page, spread, or section via the Restart Numbering Every pop-up menu.
- ✔ Add a prefix and/or suffix to your footnote numbers via the Prefix and Suffix fields. Note the unnamed pop-up menus that let you add special characters such as a thin space or bracket.
- ✔ Use the Position and Character Style options in the Footnote Reference Number in Text subsection to determine how the footnote characters appear in text.
- ✔ Similarly, use the Paragraph Style and Separator options in the Footnote Formatting subsection to determine how the footnote text appears. (Note any Separator options will display after any Suffix options chosen.)

Among the features to note in the Layout pane are

- ✓ Set the preferred spacing for the footnote text in the Spacing Options section.
- ✓ Convert Word's endnotes (which will appear at the end of a story) to InDesign footnotes (which appear in the column or page that the footnote reference occurs in) by checking the Place End of Story Footnotes at Bottom of Text option.
- ✓ Control whether footnotes can break across columns via the Allow Split Footnotes option. Enabling this option can improve the layout when you have long footnotes that otherwise eat up a column of text.
- ✓ Control the ruling line above footnotes using the Rule Above options. They work like the paragraph rules covered in Chapter 15.



To change these settings for future documents, open the dialog box while no document is open and set your new defaults.

Creating Indexes

When trying to locate information in a book, nothing is as wonderful as a good index. Once upon a time, book indexing was a labor-intensive process involving piles of index cards. InDesign makes indexing much easier, while still allowing you to make key decisions about how the index is formatted.

But be warned: Indexing is complicated business and is, by and large, an expert feature. So I cover just the basics here.

Choosing an indexing style

Before you begin indexing your document, ask yourself the following questions:

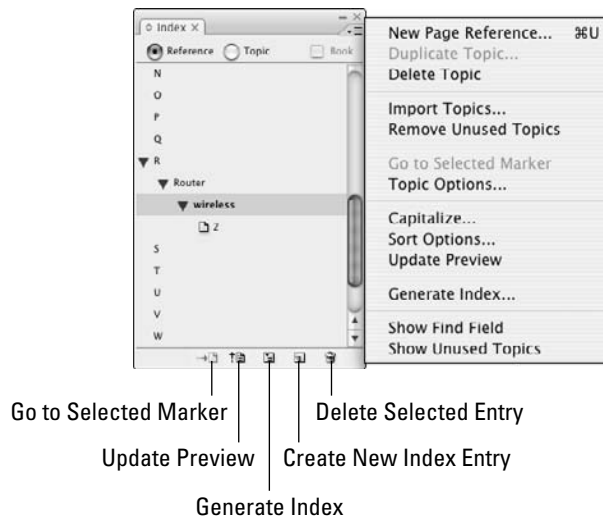
- ✓ Do you want to initial-cap all levels of all entries, or do you just want sentence case?
- ✓ Should index headings appear in boldface?
- ✓ What type of punctuation will you use in your index?
- ✓ Will you capitalize secondary entries in the index?
- ✓ Should the index be nested or run-in style? (A nested index is an indented list, with each entry on its own line. A run-in index puts all related entries in one paragraph, separated by semicolons.)

After you make these decisions, it's a good idea to make a small dummy index. From the dummy, create a master page for index pages, paragraph styles for index headings (the letters *A*, *B*, *C*, and so on), paragraph styles for each level of the index (including indents as appropriate), and character styles for any special formatting you want on page numbers or cross-reference text. InDesign doesn't do any of this for you.

Inside the Index panel

When you want to index a chapter or document, open the Index panel by choosing Window⇨Type & Tables⇨Index or by pressing Shift+F8. Use this panel to add words to the index in up to four indent levels, edit or delete index entries, or create cross-references. The Index panel is shown in Figure 21-3.

Figure 21-3:
The Index
panel and
its flyout
menu.



Two radio buttons appear at the top of the Index panel: Reference and Topic. You use Reference mode to add and edit entries from selected text. (Although it is a well-intentioned feature meant to help standardize index entries, the Topic mode's use is not intuitive, and most indexers simply ignore it and add entries manually from selected text or type phrases into the Index pane in Reference mode. You should ignore it, too.)



Select the Book check box if you are creating an index for multiple chapters in a book (see Chapter 23). You must have a book open for this option to be available. If you have a book open and do not select the Book check box, the index is saved with the current document and not opened when you open other chapters of the book.

Adding index items via the Index panel

To add entries to the index, be sure the Type tool is active, then choose New Page Reference from the Index panel's flyout menu, or press $\text{⌘}+U$ or $\text{Ctrl}+U$, to get the dialog box shown in Figure 21-4.



If the Type tool is not active when you open the dialog box, the flyout menu option will be called New Cross-Reference instead, letting you add a cross-reference entry to the index. The resulting New Cross-Reference dialog box is identical to the New Page Reference dialog box, except the various options default to ones appropriate for a cross-reference.

Figure 21-4:
The New
Page
Reference
dialog box.

Here's how the controls work:

- If you selected text first in your document, the text is entered automatically into Topic Level 1. Otherwise, type in the text that you want to add to the index. In Figure 21-4, you can see that I typed **Platform**. The text will be added to the Topic list and to the list of index entries.
- You can enter text that controls how the entry is sorted in the Sort By column. For example, if the selected text you're indexing is *The A-Team*, but you want it sorted as if it were *A-Team*, *The* (so it appears with the A entries in the index), enter **A-Team**, **The** in the Sorted By column.

- ✓ If you want a more complex index, you might want to use some or all of the four possible entry levels. You may want an index entry to appear under a higher-level topic. For example, you may want *Border Collies* to appear in the index under *Herding Dogs*, in which case you would enter **Herding Dogs** the Topic Level 1 field and **Border Collies** in the Topic Level 2 field. In Figure 21-4, I entered **wireless** in the Topic Level 2 field.
- ✓ Use the Type pop-up menu to determine the page entries for the index entry. For instance, if you select To End of Section, the page numbers for the selected text in the index will cover the range from the index entry to the end of the section it is in.
- ✓ To add just the selected text as an index entry, click Add. (If no text is selected, the text will be added to the Topic list, but no index entry will appear for it.) To add all occurrences of the text in the book, click Add All.
- ✓ To change previously defined index entries, select an entry and then choose Page Reference Options in the Index panel's flyout menu.
- ✓ At the bottom of the New Page Reference dialog box is a list of letters as well as the entry Symbols (where entries that begin with numbers and other non-letter characters will be grouped in the index). You can scroll through this list of headings to see what is already in the index under each letter. Although you might think clicking a letter would force the current index entry to appear in that letter's section of the index, it does not.



To quickly add a word or text selection to an index, highlight the text and press ⌘+U or Ctrl+U to add the text to the New Page Reference dialog box. To index a word without opening that dialog box, just press Option+Shift+⌘+[or Ctrl+Alt+Shift+[. This adds the text to the index using the index's default settings. (You can always edit them later.) And to enter an index entry as a proper name (last name, first name), use the shortcut Option+Shift+⌘+] or Ctrl+Alt+Shift+].

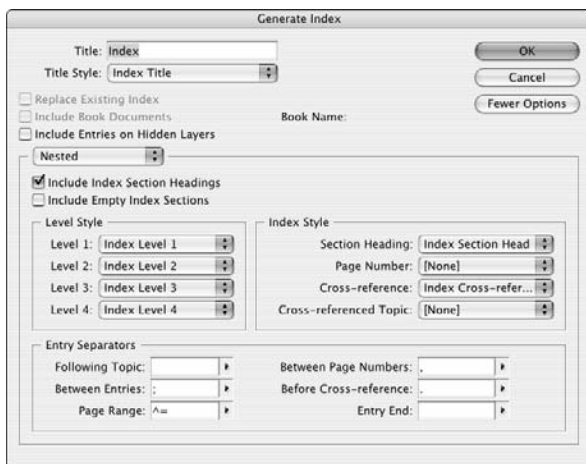
Polishing and generating the index

The Index panel's flyout menu has several options useful for generating and fine-tuning an index:

- ✓ **Duplicate Topic** lets you duplicate a topic entry so you can use the settings from one entry without having to re-enter those settings in a new entry.
- ✓ **Delete Topic** removes a topic (and any associated entries) from the index.

- ✔ **Import Topics** lets you import topic lists from other InDesign documents.
- ✔ **Go to Selected Marker** causes InDesign to jump to the text that contains the selected index entry in the Index panel.
- ✔ **Topic Options** lets you edit the Level and Sort By settings for topic entries; these affect all index entries that use them.
- ✔ **Capitalize** lets you standardize the capitalization of topic entries — you can choose Selected Topic, Selected Topic and All Subtopics, All Level 1 Topics, and All Topics.
- ✔ **Update Preview** updates the index entries in the Index panel to reflect page-number changes, new occurrences of index text occurrences, and deleted occurrences of indexed text.
- ✔ **Generate Index** creates the index via the dialog box shown in Figure 21-5. In this dialog box, you specify the following: a title for the index, the paragraph style for that title, whether a selected index is replaced with the new one, whether an entire book is indexed, whether text on hidden layers is indexed, whether the index is nested or run-in, whether empty index headings and sections are included, what paragraph styles are applied to each level of index entry, what character styles are applied to different portions of index entries, and which characters will be used as separators within index entries. (Click the More Options button to see the nested/run-in and later options.) After you generate an index, you get the standard InDesign loaded-text icon (the paragraph icon); click an existing text frame into which you want to flow the index, or click anywhere else in a document to have InDesign create the text frame for you and flow the index text into it.

Figure 21-5:
The
Generate
Index dialog
box, with all
options
displayed.



Creating Tables of Contents

A table of contents (TOC) is useful in a long document because it helps readers locate information quickly. A TOC is simply a list of paragraphs that are formatted with the same styles. This means that if you want to use the table of contents feature, you have to use paragraph styles. Not only do styles guarantee consistent formatting, but they also tell InDesign what text you want to include in your TOC.

After you've created a book (or even a single document), InDesign can build a table of contents by scanning pages for the paragraph styles you specify. For example, if you create a book, you might use paragraph styles named *Chapter Title*, *Section*, and *Subsection*. Using the table of contents feature, InDesign can generate a table of contents that includes all three levels.

TOC styles manage the text that you want in a table of contents, the order in which it appears, how page numbers are added, and how the various TOC elements are formatted. To create a TOC style, choose **Layout > Table of Contents Styles**, which opens the dialog box shown in Figure 21-6.

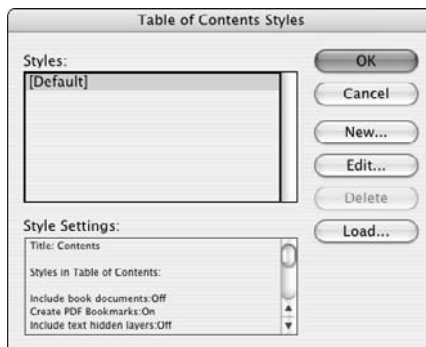


Figure 21-6:
The Table of
Contents
Styles
dialog box.

In the Table of Contents Styles dialog box, click **New** to create a new TOC style. You can also edit an existing TOC style via the **Edit** button, delete one via the **Delete** button, and import one from another InDesign document via the **Load** button.

Here's how to create a TOC style after clicking the **New** button:

- 1. Enter a name for the TOC style in the TOC Style field (shown in Figure 21-7).**

The default is TOC Style 1.

2. In the Title field, enter a heading for the TOC.

This text appears in your table of contents.

If you don't want a title, leave the Title field blank, but note that you still get an empty paragraph at the top of your TOC for this title. You can always delete that paragraph.

3. Use the Style pop-up menu to choose the paragraph style that this title will have.

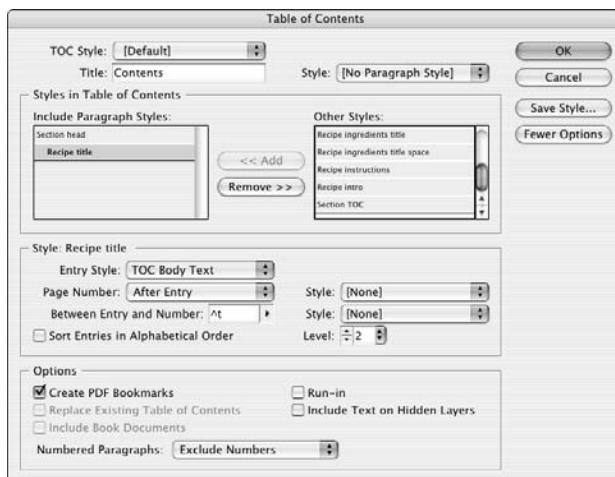


Figure 21-7:
The Table of
Contents
dialog box.

4. In the Styles in Table of Contents section, click a paragraph style that you want to appear in your TOC from the Other Styles list at right.

For example, you might click Chapter Title.

5. Click Add to add it to the Include Paragraph Styles list at left. (Select a style from the Include Paragraph Styles section and click Remove to remove any paragraph styles you don't want to be used in the TOC.)

6. Repeat Steps 4 and 5 until you have added all the paragraph styles that you want to include in the TOC.

7. Use the Entry Style pop-up menu to select a TOC level and then choose the paragraph formatting for that style.

If the Entry Style, Page Number, and other options don't display, click the More Options button to see them.

- Use the Page Number pop-up menu to determine how page numbers are handled: After Entry, Before Entry, and No Page Number. If you want the page numbers to have a character style applied, choose that style from the Style pop-up menu to the right of the Page Number pop-up menu.
 - Use the Between Entry and Number field and pop-up menu to choose what appears between the TOC text and the page number. You can enter any characters you want; use the pop-up menu to select special characters such as bullets and tabs. In most cases, you should select a tab; the paragraph style selected earlier for the TOC entry includes leader information, such as having a string of periods between the text and the number. You can also apply a character style to the characters between the text and the page numbers via the Style pop-up menu at right.
 - To sort entries at this level alphabetically, such as for a list of products in a brochure, select the Sort Entries in Alphabetical Order check box.
 - To change the level of the current TOC entry, use the Level pop-up menu. If you change the level of entries, InDesign will correctly sort them when it creates the TOC, even if the levels seem out of order in the Include Paragraph Styles list.
 - In the Options section of the dialog box, choose the appropriate options. Check Create PDF Bookmarks if you're exporting the document to PDF format and want the PDF TOC file to have *bookmarks* (a clickable set of TOC links). Check Run-in if you want all entries at the same level to be in one paragraph. (This is not common for TOCs but is used in indexes and lists of figures.) Check Replace Existing Table of Contents if you want InDesign to automatically replace an existing TOC if the TOC style is changed. Check Include Text on Hidden Layers if you want text on hidden layers to be included in the TOC. Check Include Book Documents if you have a book open and want InDesign to generate a TOC based on all chapters in that book. (InDesign will show the current open book's name.) Finally, control whether numbers are included in the table of contents for numbered paragraphs using the new Numbered Paragraphs pop-up menu.
- 8. Continue this process for each paragraph style whose text should be in the TOC.**

Note that the order in which you add these styles determines the initial levels: The first paragraph style added is level 1; the second is level 2, and so on. But you can change the order by changing the Level setting, as described earlier.

To make changes to a TOC style, go to the Edit Table of Contents Style dialog box. Choose Layout⇨Table of Contents Styles, select the TOC style to edit, and click Edit.

With a TOC style in place and your document properly formatted with the paragraph styles that the TOC style will look for when generating a TOC, you're ready to have InDesign create the actual TOC for you.

To generate a TOC, choose Layout⇨Table of Contents. You get a dialog box that is identical to the Table of Contents dialog box shown in Figure 21-7. In this dialog box, you can make changes to the TOC style settings. (If you want to save those TOC style changes, be sure to click the Save Style button.) Then click OK to have InDesign generate the TOC. You might also get a dialog box asking whether you want to include items in *overset text* (text that didn't fit in your document after you placed it) in your TOC. It may take a minute or two for the program to generate the TOC. (See Chapter 13 for more details on overset text.)



Be sure you allow enough space (a single text frame, a series of linked text frames, or one or more empty pages) for the TOC before generating a final TOC because if you end up adding or deleting pages based on the TOC length, the TOC will display the old page numbers. To update page numbering after flowing a TOC, simply rebuild the TOC by selecting the text frame holding the TOC and then choosing Layout⇨Update Table of Contents.

If you select a text frame, InDesign will place the TOC text in it when you generate the TOC. If you don't select a text frame, you see the familiar loaded-text icon (the paragraph pointer) that you see when you place a text file. Click a text frame to insert the TOC text in that frame or click in an empty part of your document to create a text frame in which the TOC text will flow.



The feature that creates TOC is actually a list generator, and you can use it to create other kinds of lists. Basically, anything that is tagged with a paragraph style can be used to create a list. For example, if your figure captions all use their own paragraph style (called Caption Title in this example), you can generate a list of figures by creating a TOC style that includes just the Caption Title paragraph style. An InDesign document can have more than one TOC, so you can include multiple lists in your document.

Chapter 22

Working with Automated Text

In This Chapter

- ▶ Setting up automatic page numbers
 - ▶ Working with section markers
 - ▶ Setting up text variables
 - ▶ Setting up hyperlinks for Web pages and PDF files
-

A key area of improvement over the years in InDesign is the increased use of automated text. From the very beginning, InDesign offered automatic page numbers so your folios and cross-references would reflect the current pages as your layout changed. Later versions enhanced this with section markers, which let you create variable names in folios for your section titles. Still later came the ability to use data files and merge their contents into a layout to customize your output, similar to how word processors let you customize labels with their mail-merge feature. The newest version of InDesign adds to this mix a new option: variable text, which gives you more flexibility in where and how you can have InDesign update text automatically throughout a document based on your specifications.

Altogether, these features have helped InDesign stake significant ground in reducing the labor and time of manual processes, such as search and replace, for text that changes predictably throughout the document.

Another type of text variable is the hyperlink — the Web address used in Web pages and PDF files so users can just click text to be transported to another page. While the text itself does not change, the underlying hyperlink information can change, and InDesign lets you specify and update these hyperlinks as needed.

Automatic Page Numbers

You'll often want page references in text — the current page number in a folio, for example, or the target page number for a “continued on” reference. You could type in a page number manually on each page of a multipage document,

but that can get old fast. As I mentioned in Chapters 4 and 6, if you're working on a multipage document, you should be using master pages. And if you're using master pages, you should handle page numbers on document pages by placing page-number characters on their master pages.

If you want to add the current page number to a page, you can choose **Type**⇨**Insert Special Character**⇨**Markers**⇨**Current Page Number** or press **Option+Shift+⌘+N** or **Ctrl+Shift+Alt+N** whenever the **Type** tool is active and the text-insertion cursor is flashing. If you move the page or the text frame, the page-number character is automatically updated to reflect the new page number.

To create “continued on” and “continued from” lines, choose **Type**⇨**Insert Special Character**⇨**Markers**⇨**Next Page Number** to have the next page's number inserted in your text, or choose **Type**⇨**Insert Special Character**⇨**Markers**⇨**Previous Page Number** to have the previous page's number inserted. (There are no shortcuts for these complex menu sequences.) That next or previous page will be the next or previous page in the *story*, not the next page in the document.



One flaw in InDesign's continued-line approach is that the text frames must be linked for InDesign to know what the next and previous pages are. Thus, you're likely to place your continued lines in the middle of your text. But if the text reflows, so do the continued lines. Here's a way to avoid that: Create separate text frames for your continued-on and continued-from text frames. Now link just those two frames, not the story text. This way, the story text can reflow as needed without affecting your continued lines.

Using Section Markers

InDesign offers another marker called the section marker that lets you insert specific text into your document and update it by just changing the marker text.

The section marker is defined as part of a section start (see Chapter 4), and it's meant to be used in folios to put in the section name or chapter name. But you can use it anywhere you want — and for anything you want, not just for section or chapter labels.

To define a section marker (there can be only one per section, of course), open the **Pages** panel (**Window**⇨**Pages**, or **⌘+F10** or **Ctrl+F10**) and choose **Numbering & Section Options** from the panel's flyout menu. In the resulting dialog box, type a text string in the **Section Marker** field. Then click **OK**.

To use the marker, have the text insertion point active in whatever text frame you want to insert it, and then choose **Type**⇨**Insert Special Character**⇨**Markers**⇨**Section Marker**. That's it!

Using Text Variables



The section marker was clearly the inspiration for the new text-variable feature. Why stop at section markers? With InDesign CS3's new text variables, you can define an unlimited number of text variables that InDesign will happily update across your documents whenever you change them or your layout does.

Creating text variables

To create a text variable, choose **Type**⇨**Text Variables**⇨**Define**. You'll get the Text Variables dialog box shown in Figure 22-1. It lists existing text variables — including the seven ones predefined in InDesign: Chapter Number, Creation Date, File Name, Last Page Number, Modification Date, Output Date, and Running Header. Any of them that you create will be added to this list.



The source of the number used in the Chapter Number text variable is something you define as part of a book. For each document in a book, you can specify its chapter number using the Document Numbering Options dialog box accessed from the book panel's flyout menu. Chapter 23 explains books and how to set the chapter number.

To create a new text variable, click **New**. You'll get the New Text Variable dialog box shown in Figure 22-2. Give the variable a name in the Name field, and choose the type of variable you want from the Type pop-up menu. Your choices are the seven predefined types plus Custom Text, which lets you put in any text of your choosing. (This means you can create more than one variable for, say, File Name or Modification Date. You might do this because you want them formatted differently in different usage scenarios.)

The options for formatting the chosen type of variable varies based on the type of variable it is. Three options are available for more than one type of text variable:

- ✓ **Text Before and Text After:** These two fields — available for all Type pop-up menu options except Custom Text — let you add any text you want before or after the variable. For example, you might enter the word *Chapter* in the Text Before field for a Chapter Number variable. Note that both fields have an unnamed pop-up menu to their right from which you can select a variety of common symbols and spaces.
- ✓ **Style:** This pop-up menu lets you select the style to apply in the Chapter Number, Running Header (Character Style), and Running Header (Paragraph Style) text variables.

- ✓ **Date Format:** This field and its associated pop-up menu lets you choose the desired date and time formats for the Creation Date, Modification Date, and Output Date text variables. Examples include *MM/dd/yy* to get a date like 05/08/62 and *MMMM d, yyyy* to get a date like August 15, 1962. Don't worry about memorizing codes — just pick the desired options from the pop-up menu instead.

Several other variables have unique options:

- ✓ **Custom Text:** This has the fewest options. Just enter the desired text, including choosing special characters such as spaces and dashes from the unnamed pop-up menu to the right of the Text field. That's the only field to adjust for this text variable.
- ✓ **Last Page Number:** In addition to the Text Before, Text After, and Style formatting controls, this type includes one unique control: the Scope pop-up menu. Here, you choose between Section and Document to tell InDesign what you mean by last page number: the section's last page or the document's.
- ✓ **File Name:** In addition to Text Before and Text After formatting controls, this type has two unique check boxes — Include Entire Folder Path and Include File Extension — to tell InDesign exactly how much of the filename to include. If both are unchecked, InDesign will include just the core filename, such as Jun 07 TOC. Checking the Include Entire Folder Path will add the file location before the core filename, such as MacintoshHD: Projects:Jun 07 TOC or C:\Projects\Jun 07 TOC. Checking the Include File Extension will append the filename extension, such as June 07 TOC.indd.
- ✓ **Running Header:** The formatting options for these two types are the most complex, as shown in Figure 22-2. The two Running Header menu options have two options not available to other Type pop-up menu options:
 - **Use:** This determines which text to use: First on Page uses the first text on the page that has the specific style applied, while Last on Page uses the last text on the page that has the specific style applied.
 - **Options:** Here, you can control whether the punctuation of the source text is retained or not in the running header (check Delete End Punctuation to remove it) and whether the running header overrides the text of the source text's capitalization (check Change Case and then choose the appropriate capitalization option: Upper Case, Lower Case, Title Case, or Sentence Case).



Title case means that the first letter of each word is capitalized, while Sentence Case means that only the first letter of the first word in each sentence is capitalized.

Figure 22-1:
The Text
Variables
dialog box.

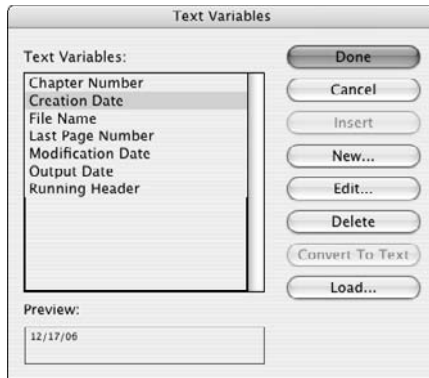
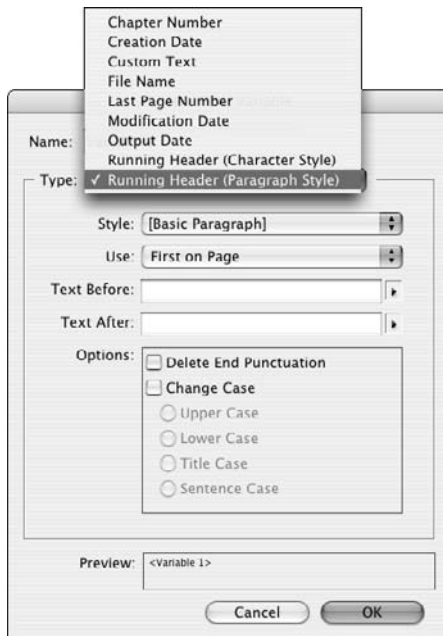


Figure 22-2:
The New
Text
Variable
dialog box.



Editing and managing text variables

Editing text variables is very much like creating them: Just select the variable to change and click Edit in the Text Variables dialog box. You'll get the Edit Text Variable dialog box, which is identical except for its name to the New Text Variable dialog box covered in the previous section.

You can also import text variables from other documents by clicking Load in the Text Variables dialog box, and then choosing the document to import the variables from. After choosing a document, you'll get the Load Text Variables dialog box, where you can select which variables are imported and handle name conflicts.

To get rid of a text variable, select it from the list in the Text Variables dialog box and click Delete.

To convert a text variable in your document to the actual text, highlight it and either choose Type⇨Text Variables⇨Convert Variable to Text or, if you happen to be in the Text Variables dialog box, click Convert to Text.

Inserting text variables

Inserting text variables in your document uses the same essential process as inserting a special character such as a section marker, except you use the Text Variables menu option: Choose Type⇨Text Variables⇨Insert Variable, and then choose the desired variable from the submenu. If you happen to be in the Text Variables dialog box, click Insert.

Using Hyperlinks

Both Web pages and PDF files can include hyperlinks, the clickable hot spots that direct a browser to open a new file or page. It's a whole new way to deliver related contents through an active cross-reference. And InDesign lets you add hyperlinks to your documents, so if they are exported to the PDF or Web formats, those links are clickable.

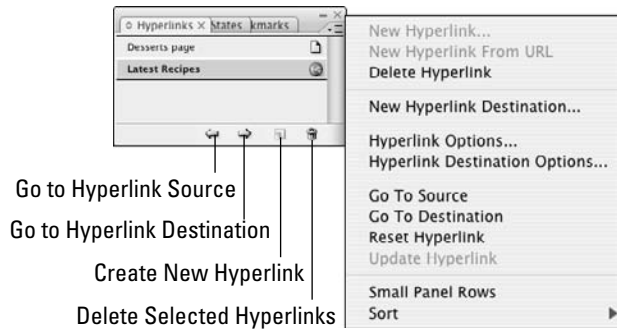
InDesign uses its Hyperlinks panel (Window⇨Interactive⇨Hyperlinks) to add, edit, and delete hyperlinks. In a sense, a hyperlink is a character attribute — it's applied to selected text. Figure 22-3 shows the Hyperlinks panel and its flyout menu.

Creating hyperlinks

Although the process is straightforward, InDesign's terminology can make it a bit confusing on how to start. You first create a hyperlink destination — the place a hyperlink goes to, or its *target* — by choosing New Hyperlink Destination from the Hyperlinks panel's flyout menu. Figure 22-4 shows the dialog box. You give the destination a name in the Name field and then choose from one of the three options in the Type menu:

- ✔ **Page.** This option lets you specify a specific page in a selected document. If you select this option, InDesign provides a Page field in which you specify the page number to open in the selected document, as well as the Zoom Setting pop-up menu, which lets you select how the page is displayed. (Options are Fixed, meaning at the default size in Adobe Reader; Fit View; Fit in Window; Fit Width; Fit Height; Fit Visible; and Inherit Zoom, which uses the current zoom setting in Adobe Reader.)
- ✔ **Text Anchor.** This option lets you specify a specific piece of text in the selected document. This would be the selected text.
- ✔ **URL.** This is a Web page address (the official name is Uniform Resource Locator), as shown in the New Hyperlink Destination dialog box in Figure 22-4. If you select this option, InDesign displays the URL field in which you type the Web address.

Figure 22-3:
The
Hyperlinks
panel and
its flyout
menu.



With the destinations defined, you can now create the hyperlinks to them (the hyperlink *sources*).



To create a hyperlink to another PDF file, you can't use the New Hyperlink Destination method. You must use the New Hyperlink method described next.

To create a hyperlink source:

1. **Select the text or frame you want to be a hyperlink's source, and then choose New Hyperlink from the Hyperlinks panel's flyout menu.**

That opens the New Hyperlink dialog box, as shown in Figure 22-5.

2. **Type a name for the hyperlink source.**

This lets you apply the same link to more than one location in your document — sort of a character style for hyperlinks. If the name already exists, an error message appears when you click OK — there's no way to know ahead of time if the name has already been used in the document.

Links to other documents

The process for linking to other documents depends on whether those documents are on the Web or on a CD or internal server.

If you want to create a hyperlink to another document, such as on a CD or server, you must do so in the New Hyperlink Destination dialog box, using the Page option. You cannot first create a destination hyperlink. Also, unintuitively, you must browse for the actual InDesign file to which you want to link. But the link will be to the PDF version of that file, which means you must be sure to create the PDF of that other document and use the same filename, except for the filename extension. For example, if you link to `filename.indd`, the link will actually be to

`filename.pdf`. This approach requires that you have all the target files in InDesign format—you cannot link to a specific PDF file created in another program or by someone whose source files you don't have access to.

By contrast, Web links can link to any object available on a Web server, including PDFs, so you would simply use a hyperlink to a Web address, such as `http://www.zangogroup.com/filename.pdf`, in the New Hyperlink dialog box. Note that such Web links cannot be made to a specific page inside a PDF file, as InDesign allows when making links from one document to another as described in the previous paragraph.

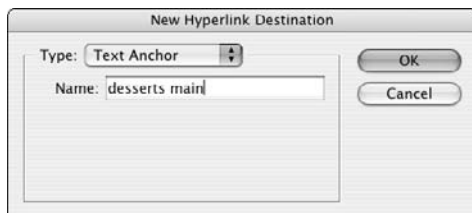
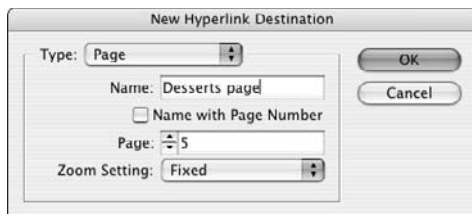
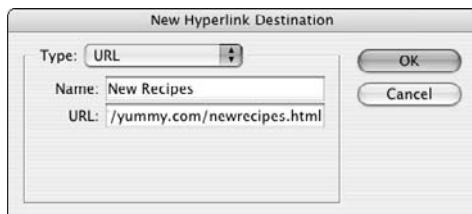


Figure 22-4: The New Hyperlink Destination dialog box's three variants are (from top to bottom) URL, Page, and Text Anchor.

3. If the hyperlink is to another InDesign document, you can select that document by choosing Browse from the Document pop-up menu.

4. Use the Type pop-up menu to determine what you're hyperlinking to.

You have the same three options as in the New Hyperlink Destination dialog box's Type menu — Page, Text Anchor, and URL — as well as All Types, which, if chosen, displays previously defined hyperlinks in the document.

5. Use the Name pop-up menu to select a previously defined hyperlink destination (target) or an anchor.

You can also create a hyperlink to an Unnamed destination by leaving the Name pop-up menu set to [None]. But I advise against the [None] method because that hyperlink destination won't appear in the menu for future hyperlink sources, making it hard to modify later.

6. In the Appearance section, you can control how the hyperlink appears on-screen:

- Use the Type pop-up menu to choose Invisible Rectangle or Visible Rectangle. The Invisible Rectangle option gives no visual indication that the text contains a hyperlink, except that the mouse pointer becomes a hand icon when the reader maneuvers through the document. (You would typically pick this option when you've used blue underline as a character attribute for the hyperlink text to mirror the standard Web way of indicating a hyperlink.) The Visible Rectangle option puts a box around the text using the four settings below (they are grayed out if Invisible Rectangle is selected).
- The Highlight pop-up menu lets you choose how the source text or frame is highlighted: None, Invert (reserve the foreground and background colors), Outline (places a line around the source), and Inset (places a line around the source, but inside any frame stroke; for text, it's the same as Outline).
- The Color pop-up menu displays Web-safe colors, as well as any colors you defined in the document.
- The Width pop-up menu lets you choose the thickness of the line used in the Outline and Inset options from the Highlight pop-up menu. The choices are Thin, Medium, and Thick.
- You can choose the type of line in the Style pop-up menu: Solid or Dashed.



If your text includes a valid hyperlink, such as www.InDesignCentral.com, you can select it and create a URL hyperlink automatically by choosing New Hyperlink from URL in the Hyperlinks panel's flyout menu.

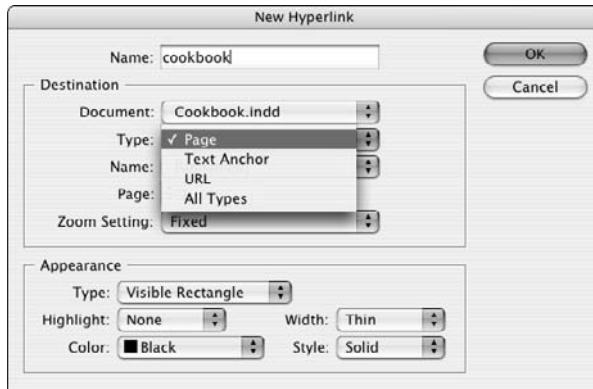


Figure 22-5:
The New
Hyperlink
dialog box.

After your hyperlink sources are defined, you can easily apply them by selecting text and clicking an existing hyperlink source from the Hyperlinks panel. You can also jump to the source or destination by selecting the desired hyperlink in the Hyperlinks panel and choosing either Go to Source or Go to Destination from the flyout menu, or click the Go to Hyperlink Source or Go to Hyperlink Destination iconic buttons at the bottom of the panel. These make a handy way to verify the links are correct.

Modifying and deleting hyperlinks

It's also easy to modify hyperlinks: Choose Hyperlink Options from the Hyperlinks panel's flyout menu to open the Hyperlink Options dialog box, which has the same options as the New Hyperlink dialog box, shown in Figure 22-5, to modify the source. Similarly, to modify hyperlink destinations, choose Hyperlink Destination Options from the palette menu to open the Hyperlink Destination Options dialog box, and then select the target from the Name pop-up menu. The Hyperlink Destination Options dialog box's options are the same as the New Hyperlink Destination dialog box shown in Figure 22-5.

You can change the source text or frame by selecting it, and then clicking the hyperlink name in the Hyperlinks panel, and finally choosing Reset Hyperlink from the panel's flyout menu. To change the target for a hyperlink to an InDesign document, choose Update Hyperlink from the flyout menu (press and hold Option or Alt to select a file that is not open).

To delete a hyperlink target, choose it in the Hyperlink Destination Options dialog box, and then click Delete. (Click Delete All to delete all targets defined in the document.)

To delete a hypertext source, select it in the Hyperlinks panel and then choose Delete Hyperlink from the flyout menu or click the Delete Selected Hyperlinks iconic button at the bottom of the panel.



When you export your InDesign files to PDF files (choose File⇨Export, or press ⌘+E or Ctrl+E, and choose Adobe PDF from the Format pop-up menu), be sure to select the Hyperlinks option in the Include section of the General pane in the Export PDF dialog box. If you export to the XHTML format to create a Web page from your InDesign document (File⇨Cross-Media Export⇨XHTML/Dreamweaver), the hyperlinks are included automatically. (And note that you don't need to use Adobe's Dreamweaver Web editing software to work on these exported Web pages; any HTML editor or HTML-capable text editor will do.)

Chapter 23

Publishing Books

In This Chapter

- ▶ Creating books
 - ▶ Working with chapters
 - ▶ Printing chapters and books
 - ▶ Numbering pages and sections
-

Not only is InDesign useful for short documents like ads and newsletters, but it also can comfortably handle longer, multi-chapter documents such as books and manuals. The most common and easiest way to build longer documents, especially those created by more than one author or contributor, is to create multiple InDesign documents and then assemble them into a larger book.

InDesign's book feature lets you

- ✔ See who is working on each chapter and when.
- ✔ Update styles and swatches across documents for consistency.
- ✔ Update page numbers across multiple documents.
- ✔ Create a unified table of contents and a unified index for multiple documents, using the techniques covered in Chapter 21.
- ✔ Easily print or create a PDF file from all the chapters of a book.

Book Basics

In InDesign, a *book* is a specific type of file that you create to track chapters or multiple documents that make up the book. Using InDesign's book panels, you can add, open and edit, rearrange, and print chapters of the book. The

book palette is nice for workgroups because multiple users can open the same book and access different chapters; it also works well if you are a single user working on a multi-chapter book.

Creating a new book

To create a new book, choose File⇒New⇒Book. The New Book dialog box lets you specify a location for the book and give it a name. Click Save to create and open the book.

Opening and closing a book

Open an existing book by using the File⇒Open command (⌘+O or Ctrl+O). Each book will appear in its own panel. (If several books are open, the panels will be contained in a free-floating panel group.) When viewing folder and disk contents via the Mac's Finder or Windows's Explorer, you can also double-click a book's icon or filename to open it.

To close a book's panel, and any book documents that are in it, simply click its close box.

Adding chapters to books

A new book panel is empty — you need to add chapter documents to fill it up. To do this, click the Add Document iconic button — the + icon on the bottom-right of the book's panel (see Figure 23-1) — or use the Add Document option in the book panel's flyout menu. Use the Add Chapter dialog box to locate and select the first chapter you want to add. Click the Add button to make this the first chapter in the book. Repeat this process to add to the book all the chapters you have ready (you can also add more later).



Chapters are listed in the book panel in the order in which you add them. You may want to rearrange them to match the actual order of the book project — especially if you are numbering the book automatically from start to finish, since InDesign will number them based on their order in the book panel. To rearrange the relative position of chapters, just click and drag chapter names up or down within the panel to put them in the desired order.

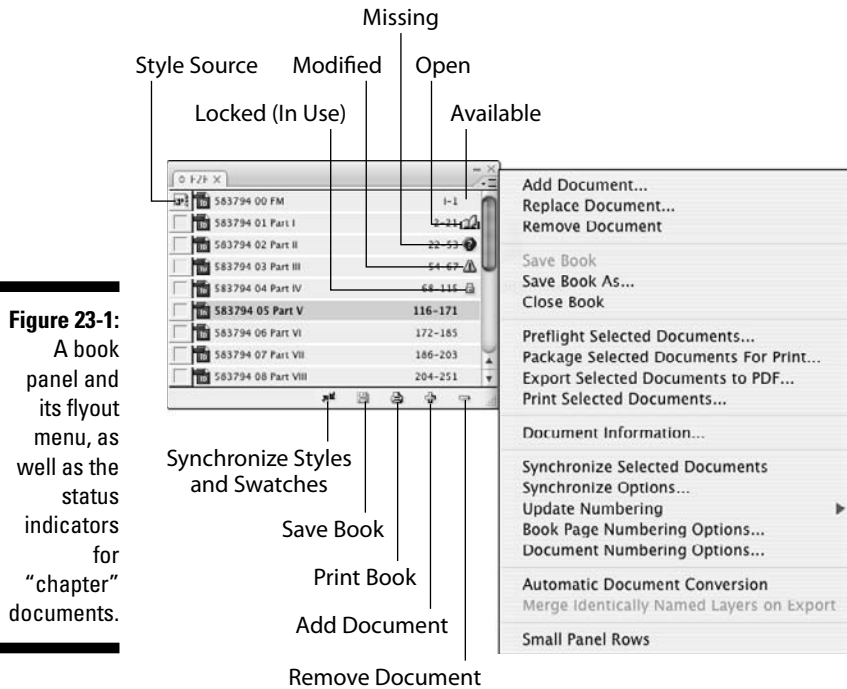


Figure 23-1:
A book panel and its flyout menu, as well as the status indicators for “chapter” documents.

Working on Chapters

To work on a chapter in a book, first open the book and then double-click the chapter name in the book’s panel. The chapter opens in InDesign just like any other InDesign document. For a chapter to be opened, it must be marked as Available, as explained in the next section. When you finish editing a chapter, save and close it as usual.

Replace an existing chapter with another document by selecting the chapter in the book panel and choosing Replace Document from the flyout menu. Navigate to a new document, select it, and click the Open button. InDesign will replace the selected chapter with the new document.

Delete chapters from a book by choosing Remove Document from the flyout menu or by clicking the Remove Document iconic button (the – icon) at the bottom of the panel.

InDesign offers three other menu options in the flyout menu that come in handy for managing a book: You can save books by choosing Save Book, save to a new name by choosing Save Book As, and close the book by choosing Close Book (any changes to the book are not saved, although a warning box gives you the chance to save any unsaved changes).

Finding out about chapter status

When you use the book panel in a workgroup, it provides helpful status reports about each chapter. (Figure 23-1 shows the icons used to indicate a chapter's status.) The statuses are

- ✓ **Available:** The chapter can be opened, edited, or printed. Only one user at a time can open a chapter.
- ✓ **Open:** You have the chapter open and can edit it or print it. Nobody else can open the chapter at this time.
- ✓ **In Use:** Another user has the chapter open. In this case, you cannot edit or open the chapter.
- ✓ **Modified:** The chapter has been changed since the last time you opened the book panel. Simply click the chapter name to update it.
- ✓ **Missing:** The chapter's file has been moved since it was added to the book. Double-click the chapter name to open the Find File dialog box and locate it.

The Document Information menu option in the book panel's flyout menu provides useful information. When you select a chapter and choose this option, you can see the file's modification date, location, and page range, and you can replace the chapter with a different document.

Taking advantage of style sources

The first chapter you add to the book is, by default, the style source. You can tell which chapter is the style source by the icon to the left of the chapter name. In most cases, you want the styles, swatches, and so on to remain the same from chapter to chapter. The style source in an InDesign book defines the styles and swatches that are common to all the chapters in the book.

If you decide to make a different chapter the style source, all you need to do is (in the book panel) click in the column to the left of that chapter's file name. This moves the icon indicating the style source to that chapter. But note that indicating a style source is not the end of the story; to ensure formatting consistency, you will need to synchronize all the book's chapters to that source, as explained in the next section.

Synchronizing formatting

When you use the Synchronize feature, InDesign makes sure that the paragraph styles, character styles, table styles, cell styles, object styles, trap presets, TOC styles, master pages, and color swatches in each chapter in the

book match those in the style source. This enforces consistency, but also means you have to make sure you choose the correct chapter as the standard, because its settings will override the other chapters' settings.

The book panel includes a Synchronize iconic button, as well as a Synchronize Selected Documents or Synchronize Book menu item in the flyout menu. Before you synchronize, make sure that you're happy with the styles, master pages, and other settings you've established in the style source and then follow these steps to synchronize:

- 1. Be sure that all chapters are available for editing.**
- 2. Choose the style source by clicking the box to the left of the source chapter so that the style-source icon appears.**
- 3. Choose Synchronize Options from the book panel's flyout menu, which opens a dialog box.**

Make sure that every type of item you want to synchronize — Object Styles, TOC Style, Character Styles, Paragraph Styles, Table Styles, Cell Styles, Master Pages, Numbered Lists, Text Variables, Trap Presets, and Swatches — is checked.

(InDesign CS3 adds the ability to synchronize master pages across book chapters, as well as the new table styles, cell styles, numbered lists, and text variables.)

- 4. Select the chapters you want to synchronize and either click the Synchronize button or choose Synchronize Selected Documents from the flyout menu.**

If no chapters are selected, InDesign assumes you want to synchronize *all* chapters; the menu option Synchronize Book will appear in the flyout menu rather than Synchronize Selected Documents in that case.

- 5. Compare the styles (character, paragraph, object, table, cell, and TOC), swatches (color, tint, and gradient), text variables, numbered lists, master pages, and trap presets, in the style source to those in each chapter.**

If anything is different, the information in each chapter will be updated to match the style source. If someone changed the typeface in a style sheet in a chapter, it will revert to the typeface specified in the style source. If anything is missing from a chapter — for example, if you just added a swatch to the style source but not to other chapters — that information is added to each chapter. If a chapter uses its own style or swatch not defined in the source style, that unique style or swatch is *not* changed or removed — these local additions are retained.



By using the synchronize feature, you give each chapter the same basic set of styles and swatches as the style source, although you can still add more of these specifications to individual chapters. Keep in mind that synchronizing doesn't repair the formatting fiascos that can happen when multiple users work on the same book. Be sure everyone who needs to know the standards for the design has access, ahead of time, to that information.

Printing Chapters and Books

Using the book panel, you can print any chapters with the status of Available or Open. Here's how:

1. To print the entire book, make sure no chapters are selected.

To print a contiguous range of chapters, Shift+click the first and last chapters that you want to print. To print noncontiguous chapters, ⌘+click or Ctrl+click the chapters to select them.

2. Click the Print Book iconic button or choose Print Book or Print Selected Documents in the book panel's flyout menu (the option will depend on whether chapters are selected in the book panel).

The standard InDesign Print dialog box opens. Note that the option to choose all pages or a range of pages is grayed out — you must print all chapters in the selected chapters.

3. Make any adjustments in the Print dialog box.

4. Click Print to print the chapters.



You can also output a book to PDF by using the Export Book to PDF or Export Selected Documents to PDF menu items in the flyout menu. These menu items work like their equivalent Print versions.

Working with Sections in Chapters

Section-based page numbering is fairly common in book-length documents because it lets you, for example, restart page numbering in each new section, such as 4.1, 4.2, and so on. Creating a section start is also the only way to start a document on a left-facing page. InDesign gives you two choices for numbering book pages: You can let the book panel number pages consecutively from one chapter to the next, or you can add sections of page numbers, which carry through the book until you start a new section.

Numbering pages consecutively

If your book chapters don't have sections, use consecutive page numbering, in which the first page number of a chapter follows the last page number of the previous chapter (for example, one chapter ends on page 224, and the next chapter starts on page 225).

Consecutive page numbering is applied by default in InDesign. If for some reason a document resets its numbering, go to that document, open the Section dialog box (choose Numbering & Section Options in the Pages panel's flyout menu), and select Automatic Page Numbering.

Consecutive page numbering works as follows:

- ✓ Whenever you add a chapter that contains no sections, or that has section numbering set to Automatic Page Numbering, InDesign numbers pages consecutively throughout the book.
- ✓ As you add and delete pages from chapters, InDesign updates all the page numbers in the chapters that follow.
- ✓ You can force InDesign to renumber all the pages by choosing Repaginate from the book panel's flyout menu — this is handy if you changed section options in some chapters and want the book to see those changes.

Numbering pages with sections

When chapters you add to books already contain sections of page numbers (implemented through the Section dialog box, which you access via the Numbering & Section Options menu option in the Pages panel's flyout menu), section page numbering overrides the book's consecutive page numbering. The section page numbering carries through chapters of the book until InDesign encounters a new section start. So if one chapter ends on page *iv*, the next chapter starts on page *v* unless you start a new section for that chapter.

For more in-depth information about section numbering, see Chapter 4.

Setting chapter numbers

You can also see and modify any chapter's page numbering settings by selecting the chapter in the book panel, then choosing Document Numbering Options from the flyout menu. Figure 23-2 shows the dialog box. The top half of the dialog box is the same as the Pages panel's Section dialog box, whereas the bottom half — the Document Chapter Numbering area — lets you control the chapter numbering style and the chapter number itself.



The Document Chapter Numbering controls in the Document Numbering Options dialog box are new to InDesign CS3. You can force a chapter to have a specific number by selecting the Chapter Number option, have the chapter use the same chapter number as the previous document (such as when you break a chapter into two documents), and have InDesign automatically number the current document by incrementing from the previous document's chapter number.



The chapter number defined here — whether manually overridden or automatically adjusted — is what is used by the Chapter Number text variable, explained in Chapter 22.

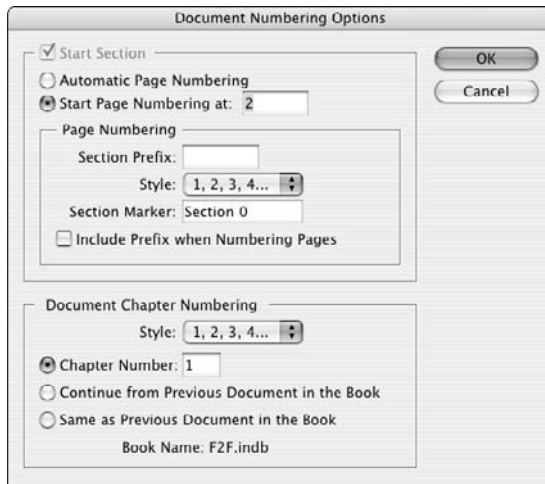


Figure 23-2:
The
Document
Numbering
Options
dialog box.

Part VII

Printing and Output Essentials

The 5th Wave

By Rich Tennant



"I've used several spreadsheet programs, but this is the best one for designing quilt patterns."

In this part . . .

Finally, your layout is done. It's beautiful, it's well-written, and you're eager to share it with your readers. This part shows you how to take the final step to print, create a PDF version of your layout, or even export to the Web's HTML format so you can distribute it to the world at large. InDesign gives you a lot of control over output, so you can optimize the results based on what you are printing it to, such as ensuring color fidelity and the best possible image resolution. Then you can start the whole creation, refinement, and output process over again with your next layout!

Chapter 24

Setting Up for Output

In This Chapter

- ▶ Checking your files before you print
 - ▶ Setting up booklets
-

You've finished your document and you want to share it with the whole world, or at least your audience. So you reach for your mouse and choose File→Print or quickly press ⌘+P or Ctrl+P so you can print.

Stop. Cancel. If this is your first print job with InDesign, you need to make sure that you've properly set up your printer to get the results you need. The process for doing so varies based on your operating system, and you can find instructions at the author's Web site at www.InDesignCentral.com.



You also should do a visual proof of your layout before you print. It's amazing what you don't notice when you're focused on specific elements as you lay out a page. Change your view setting so the entire page or spread fits in the window (choose View→Fit Page in Window or View→Fit Spread in Window, as desired) and then review your pages.

That visual check is a critical step before printing, but you should also use InDesign's tool to examine your document and, if you are printing in booklet form, you should use InDesign's tool to arrange pages in proper printing order.

Checking Your Document before Printing

InDesign has a preprinting checkup capability called preflighting. The *preflighting* capability examines your document for any issues of concern and gives you a report on what might need to be fixed.

Giving InDesign a preflighting target

Before you run the Preflight tool, you may want to set up your printer output so the tool accurately checks your document's setup in anticipation of, for example, whether you plan to output color separations or spot colors. To do this, choose File⇨Print Presets⇨Define to open the Print Preset dialog box, and then click New. The New Print Preset dialog box appears, giving you the same options as the Print dialog box (covered in Chapter 25). Click OK when you are finished with your preset, then click OK again to close the Print Presets dialog box and return to your layout. (You can also save settings in the

Print dialog box by clicking Save Preset before printing.)

But don't confuse InDesign's print setup with the operating system's printer setup. InDesign's Print dialog box contains a button called Printer (on the Mac) or Setup (in Windows) that lets you change print settings for all applications — it's essentially a shortcut to the operating-system controls described earlier in this section. You should change these operating-system settings only for output controls that InDesign's Print dialog box does not provide.

You may wonder why you need a preflighting capability to check for things such as missing fonts and images: After all, InDesign lists any missing fonts and graphics when you open a document. The answer is that sometimes fonts and graphics files are moved *after* you open a file, in which case you won't get the alerts from InDesign. This is more likely to happen if you work with files and fonts on a network drive, rather than with local fonts and graphics. Preflighting also checks for other problematic issues, such as the use of RGB files and TrueType fonts.



If you're working with the InDesign book feature (see Chapter 23), you can preflight the book's chapters from an open book's panel by using the Preflight Book option in its flyout menu. (If one or more documents in the book are selected in the panel, the menu option changes to Preflight Selected Documents.) The options are the same as for preflighting individual documents.

Using InDesign's preflighting capability is easy: Choose File⇨Preflight or press Shift+Option+⌘+F or Ctrl+Alt+Shift+F. In a few seconds, a dialog box appears that shows the status of your document. Here's what the six panes in the Preflight dialog box do:

- ✓ **The Summary pane** (shown in Figure 24-1) shows you a summary of alerts. If your document has layers, you can select or deselect the Show Data for Hidden Document Layers option. If selected, layers that won't print are analyzed for font, image, and other issues. Select this option only if the person receiving your document plans on printing hidden

layers. For example, in a French-and-English document, you may have hidden the French layer for proofing but still want it checked because the service bureau is instructed to print the document twice — once with the English layer on and the French layer off, and once with the English layer off and the French layer on.

- ✔ **The Fonts pane** (shown in Figure 24-2) shows the type of each font (Type 1 PostScript, OpenType, or TrueType) so you can spot any TrueType fonts before they go to your service bureau. (TrueType fonts usually don't print easily on imagesetters, so use a program like FontLab FontStudio or TransType to translate them to PostScript instead.) It will also show if any fonts are missing from your system. You can search for missing fonts, as well as replaced unwanted TrueType fonts, by clicking Find Font.
- ✔ **The Links and Images pane** shows whether any graphics files are missing or if the original image has been modified since you placed it in your layout. You can click Update to correct any such bad links one at a time, or Repair All to have InDesign prompt you in turn for each missing or modified file. The pane also shows whether a color profile is embedded in your graphics in case files that should have them don't or in case a file that should not have an embedded profile does. (See Chapter 25 for all the goods on color profiles.) It also alerts you if you use RGB images. Although such images will print and color-separate, InDesign provides the warning because it's usually better to convert RGB images to CMYK in an image editor or illustration program so you can control the final appearance, rather than rely on InDesign or the output device to do the translation.
- ✔ **The Colors and Inks pane** shows the color of the inks that will be used in the output. (If you are printing color separations, these correspond to the color plates that will eventually be used to print the document on a printing press.) You can't modify anything here — it's simply for informational purposes — but it's a handy way to ensure that you aren't accidentally using a spot color that will print to a separate color plate when you meant to print it as a process color using the standard CMYK plates.
- ✔ **The Print Settings pane** shows how the document is configured to print in the Print dialog box. This is why it's key to configure the output settings, as described earlier, before preflighting your document.
- ✔ **The External Plug-ins pane** shows any plug-in programs that are required in order to output the file. Amazingly, some third-party plug-ins make changes to the InDesign document that require the same plug-in to be installed at each computer that opens the file. This dialog box alerts you if you have such a dependency.

Figure 24-1:
The
Summary
pane of the
Preflight
dialog box.

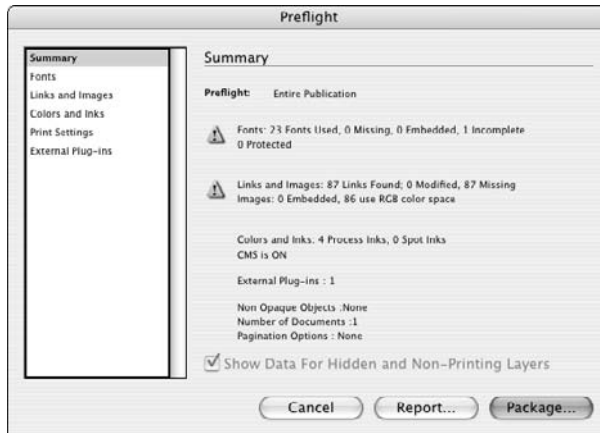
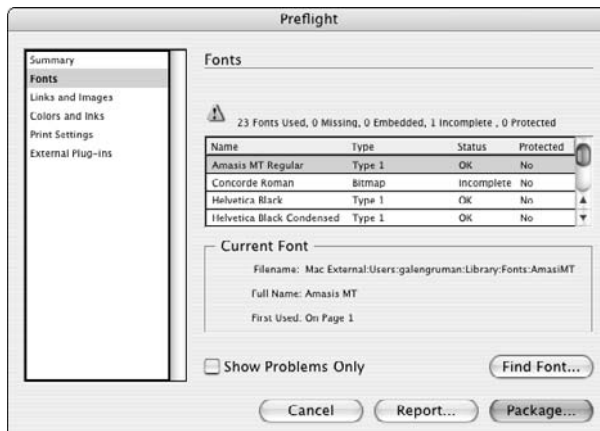


Figure 24-2:
The Fonts
pane of the
Preflight
dialog box.



You can limit the status list in most panes to display only problems by selecting the Show Problems Only option.

By clicking Report, you can generate a text file containing the information from the Preflight dialog box's panes, which you can give to your service bureau to check its settings and files against.

You can also click Package to gather all related fonts and files into one folder for delivery to a service bureau or other outside printing agency. Click Cancel to exit the Preflight dialog box and go back to your document.

Setting Up Booklets

One of the trickiest types of documents to print is a folded booklet: You can't simply print the pages in sequence and have them end up on the right location on the final sheets of paper — when you fold them, you'll find the page order is rearranged due to the folding, especially in two-sided documents.

The tried-and-true approach is to use a booklet template that essentially provides a map of where pages should be so that when they are printed and folded, they end up in the right place — and then arrange your pages in that order via the Pages panel. Figure 24-3 shows the natural order (1-8) that you typically think a booklet has, as well as the actual page order (8,1; 2,7; 6,3; and 4,5) in which it must be printed to appear as a sequence of 1 through 8.

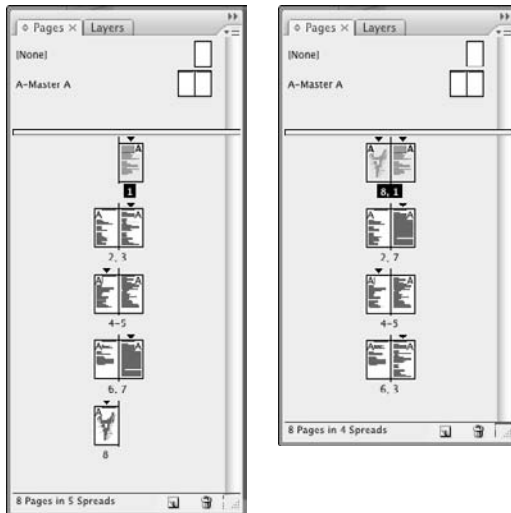
There is an easier way: The Print Booklet dialog box (File⇒Print Booklet). Here, you arrange your pages in the Pages panel in sequential order (1-8, in this case) and let the InDesign software figure out how to rearrange them for printing. Much easier! Figure 24-4 shows the Print Booklet dialog box's Setup pane.



The Print Booklet dialog box (and File menu option) replaces the InBooklet SE dialog box (and File menu option) from previous versions of InDesign. The capabilities are practically identical, although the user interface has changed. (The only real functional difference is that InBooklet SE let you specify precisely what crop marks and related options to show, whereas Print Booklet relies on InDesign's Print dialog box to do so.) InBooklet SE was a trial version of the more capable InBooklet plug-in, but the company that made this plug-in was bought by Adobe's archrival Quark, which promptly ended plug-in support for InDesign. Adobe thus created its own Print Booklet feature to plug the gap.

Figure 24-3:

Left: the logical order of pages for a folded booklet. Right: the order pages must be moved to so they print in the right sequence to be folded.



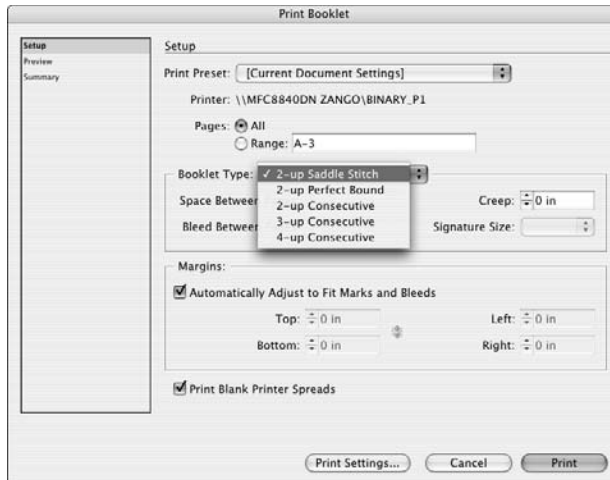


Figure 24-4:
The Setup
pane of the
Print
Booklet
dialog box.

Here are the key controls:

- ✓ **Booklet Type:** This pop-up menu is the key control. Here, you choose the type of booklet, which tells InDesign how to arrange the pages when printing so they are in the right sequence after folding. Your options are
 - **2-up Saddle Stitch:** a folded sheet that contains two pages on each side, with the staples in the centerfold, between the pages. This is used in newsletters, smaller magazines, and many office documents.
 - **2-up Perfect Bound:** a folded sheet that contains two pages on each side, where the pages are stacked and folded, then cut and held together with a glued backing or spine-based binding. This is typically used in books, larger magazines, and catalogs (because the square binding holds more pages than saddle-stitching does).
 - **2-up Consecutive:** a sheet that contains two pages on one side, with each page then cut and bound. This is essentially normal printing except that it uses a two-page sheet to print two pages at a time rather than a separate sheet for each page.
 - **3-up Consecutive:** like 2-up Consecutive, except there are three pages on a sheet.
 - **4-up Consecutive:** like 2-up Consecutive, except there are four pages on a sheet.
- ✓ **Space Between Pages** (not available for 2-up Saddle Stitch) and **Bleed Between Pages** (available for 2-up Perfect Bound only): These options let you adjust the relative spacing among pages and objects, typically to provide additional white space around the folds.

- ✓ **Creep** (not available for the Consecutive options): This option shifts pages' contents away from the spine in increasing amounts as pages fall from the center of the booklet to the outside of the booklet. Because outside pages have to fold over many inside pages, their content can end up obscured in the inside margins because their gutter is eaten up by folding over those other pages. The Creep option corrects this problem.
- ✓ **Signature Size** (available only for 2-up Perfect Bound): This option specifies how many pages are printed on each side of a sheet: 4, 8, 16, or 32.
- ✓ **Automatically Adjust to Fit Marks and Bleeds:** This option ensures that crop marks, bleeds, and other content that appears outside the page boundary are properly handled for the chosen booklet type. If not checked, you can manually adjust these settings using the Top, Bottom, Left, and Right fields.

When using these features, consult with your professional printer or service bureau for the appropriate settings. If you are printing the documents yourself, do a test run, then fold, cut, and/or staple the sample document to make sure it works as expected before printing out lots of copies. The Preview pane, shown in Figure 24-5, shows the results of your choices, but doing a dry run is always the safest option.

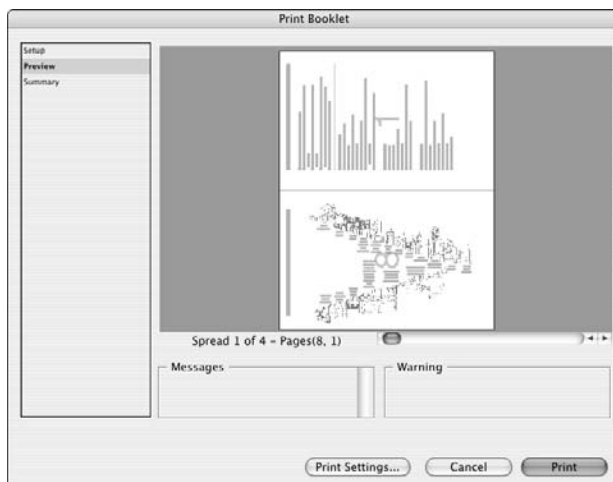


Figure 24-5:
The Preview
pane of
the Print
Booklet
dialog box.

When you're happy with your settings, choose Print to get the standard Print dialog box (covered in Chapter 25). You can also choose Print Settings to set up printer-specific controls (also covered in Chapter 25).

Chapter 25

Printing and Other Output Techniques

In This Chapter

- ▶ Calibrating colors for accurate reproduction
 - ▶ Printing your layouts to printers and other devices
 - ▶ Collecting files for service bureaus
 - ▶ Exporting to PDF files
 - ▶ Exporting to the Web
-

Printing is more complex than just choosing File⇨Print. At least, it can be, depending on what you're printing and on what printing device you're using. For example, printing a full-color brochure involves more settings and steps than printing a proof copy to your laser printer or inkjet printer. So as you go through this chapter, keep in mind that many steps aren't relevant every time you print — but understanding the basics of printing ensures that you follow the right steps for each type of project. When you know the steps for printing one document, the process for printing every other document is very easy.

Calibrating Color

If you're producing color documents for printing on a printing press, you may want to use InDesign's built-in color calibration tools. In a sense, you have to, because InDesign's color calibration is always on. But color calibration is something you don't do in a vacuum — you have to do it in your graphics programs as well, so that every piece of software that handles your graphics is working from the same color assumptions.

If you use Adobe Creative Suite 3, you can use a consistent color management system (CMS) in all of the print-oriented CS3 programs, ensuring consistent color. For scanned images, digital camera photos, and the like, you can also tell InDesign the source device so InDesign knows the color assumptions that the device makes and can use that information to adjust the colors during printing accordingly.

Ensuring consistent color

You can set the CMS settings in InDesign by choosing Edit⇨Color Settings (there is no keyboard shortcut unless you assign one yourself, as explained in Chapter 3) to get the dialog box shown in Figure 25-1.

Many of Adobe's Creative Suite 3 applications have the same dialog box, although sometimes you access it in different ways:

- ✓ **Bridge CS3:** Choose Edit⇨Creative Suite Color Settings, or press Shift+⌘+K or Ctrl+Shift+K. This sets the defaults for all CS3 applications, although you can modify individual applications as noted below. Note that if individual applications' color settings differ from the CS3-wide settings, you will see a note to that effect at the top of the affected applications' Color Settings dialog boxes.
- ✓ **Acrobat Professional 8:** Choose Acrobat⇨Preferences or press ⌘+K on the Mac, or choose Edit⇨Preferences or press Ctrl+K in Windows. Then go to the Color Management pane. Note that this pane's appearance differs from the appearance of the Color Settings dialog boxes in the other Creative Suite 3 applications.
- ✓ **GoLive 9:** Choose Edit⇨Color Settings. (No keyboard shortcut is available.)
- ✓ **Illustrator CS3:** Choose Edit⇨Color Settings, or press Shift+⌘+K or Ctrl+Shift+K.
- ✓ **Photoshop CS3:** Choose Edit⇨Color Settings, or press Shift+⌘+K or Ctrl+Shift+K.

Note that there are no CMS controls for the following CS3 applications: Adobe Device Manager, Dreamweaver, and Flash Professional.

When you place a bitmapped image into InDesign, the CMS applies the default settings defined in the Color Settings dialog box (choose Edit⇨Color Settings). If the document has no embedded color profile, a dialog box appears with a list of color profiles, as well as options to apply the default you've set up in InDesign or to apply no profile. (If you choose not to apply a profile, the color won't be adjusted during printing.)

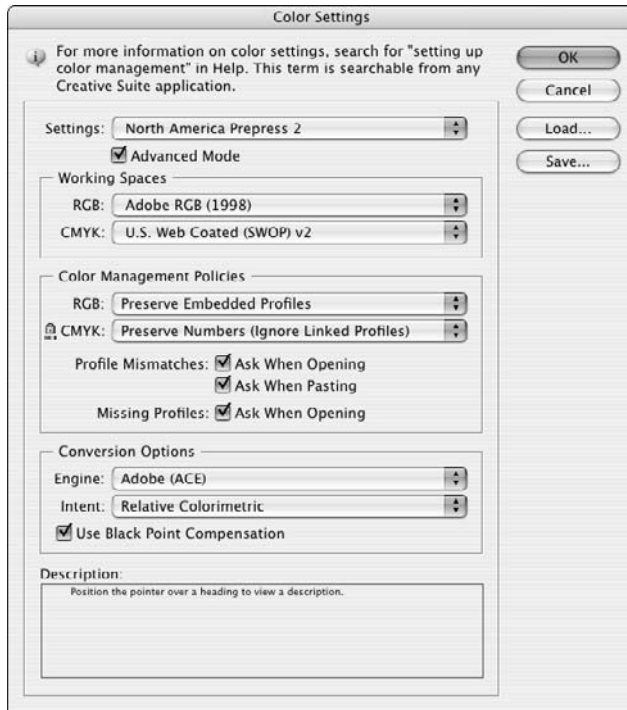


Figure 25-1:
The Color
Settings
dialog box
lets you set
application
color
defaults.

Whether or not there are embedded profiles for the document, you can change the color settings for specific images as follows:

- ✓ As you import each file, select Show Import Options in the Place dialog box (choose File⇧Place or press ⌘+D or Ctrl+D) when you place a graphic into InDesign. In the resulting Image Import Options dialog box, go to the Color pane and select the appropriate profile from the Profile menu.
- ✓ Any time after you place an image, select it and choose Object⇧Image Color Settings to apply a different profile. (You can also choose Graphics⇧Image Color Settings from the contextual menu that appears when you Control+click or right-click a graphic in InDesign.)

Saving color management preferences

You can save and use color management settings in other documents. The process is simple: Click Save in the Color Settings dialog box to save the current dialog box's settings to a file. If you want to use the saved color-settings information in another document, open that document and click Load in the Color Settings dialog box, and then browse for and select the color settings file. That's it! This is a handy way to ensure consistency in a workgroup.

Changing document color settings

If you put together a document with specific color settings, but then decide you want to apply a new profile across your pictures or replace a specific profile globally in your document, you can

- ✓ Choose Edit⇨Assign Profiles to replace the color management settings globally.
- ✓ Choose Edit⇨Convert to Profile to change the document's color workspace. It also lets you change the CMS engine, rendering intent, and black-point compensation settings.

Be sure to consult with a production manager or service bureau manager if you change these expert settings.

Note that there's real overlap in these two dialog boxes. Using the Assign Profiles dialog box to replace the document profile does the same job as the Convert to Profile dialog box when it comes to replacing the profiles. The only difference is that the Assign Profiles dialog box can also remove profiles from the document.

Calibrating output

When you're ready to output your document to a printer or other device, set the profile and rendering intent for that destination device in the Color Management pane of the Print dialog box (choose File⇨Print or press ⌘+P or Ctrl+P), which has an Options section with the Color Handling and Printer Profile pop-up menus. Here you select the appropriate option for your output device. (If you don't know, ask an expert.)

Choosing Print Options

When your document is ready to print, go to the Print dialog box (choose File⇨Print or press ⌘+P or Ctrl+P). The Print dialog box has eight panes as well as several options common to all the panes. (I cover just the essential ones here.) Change any options and click Print, and InDesign sends your document to the printer. Figure 25-2 shows the dialog box.



If you're working with the InDesign book feature (see Chapter 23), you can print the book's chapters from an open book's panel by using the Print Book option in its flyout menu. (If one or more documents in the book are selected in the panel, the menu option changes to Print Selected Documents.) The setup options are the same as for printing individual documents.

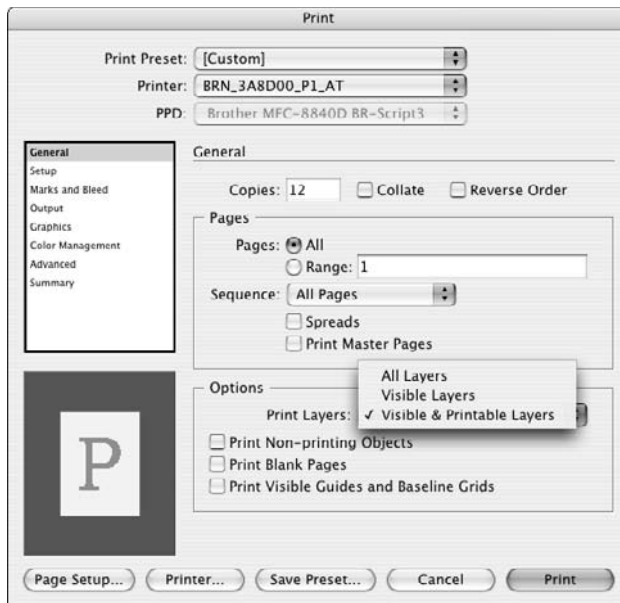


Figure 25-2:
The default
view for the
Print dialog
box.

Common options

The common options available in the dialog box, no matter what pane is selected, are as follows:

- ✔ **Print Preset pop-up menu:** This pop-up menu lets you choose a previously defined set of printer settings, which makes it easy to switch between, say, a proofing printer and a final output device.
- ✔ **Printer pop-up menu:** This pop-up menu lets you select the printer to use.
- ✔ **PPD pop-up menu:** This pop-up menu lets you select PostScript Printer Descriptions, which are files that contain configuration and feature information specific to a brand and model of printer. You usually install these into your operating system by using software that comes from your printer manufacturer. If InDesign finds no compatible PPDs, it uses generic options. If InDesign finds just one compatible PPD, it uses that automatically; otherwise, it lets you select a PPD.
- ✔ **Save Preset button:** Clicking this button saves any settings that you change in the Print dialog box and lets you choose a name for those saved settings for reuse. If you change the dialog box's settings but don't save these changes as a print preset, InDesign changes the name of the current settings in the Print Preset pop-up menu to [Custom] to remind you the settings are changed and unsaved.



You can also create print presets by choosing File⇨Print Presets⇨Define, or edit an existing preset by choosing File⇨Print Presets⇨*Preset Name*. When you click New or Edit in the resulting dialog box, a dialog box identical to the Print dialog box appears, except that the Print button becomes the OK button.

- ✓ **Setup button (Windows); Page Setup and Printer buttons (Mac):** These buttons give you access to printer-specific controls. You use these dialog boxes to specify options such as printing to file, paper sources, and printer resolution. Note that if you add a printer, you may need to quit InDesign and restart it for it to see the new printer.
- ✓ **Cancel button:** Clicking this button closes the Print dialog box without printing. Use this if you've clicked Save Preset but don't want to print, as well when you have any reason not to print.
- ✓ **Print button:** Clicking this button prints the document based on the current settings.
- ✓ **Page preview subpane:** This subpane at lower left shows the current settings graphically. The page is indicated by the blue rectangle, and the direction of the large *P* indicates the printing orientation; in Figure 25-2, shown previously, the *P* is unrotated. The figure's subpane shows that the paper itself is the same size as the page (the page is shown in white, and if the paper were larger than the page, you'd see a light gray area around the page indicating the excess paper). This preview changes as you adjust settings in the dialog box.

The General pane

The General pane contains the basic settings for your print job. Most are self-explanatory, but note the following:

- ✓ When specifying a range of pages in the Pages Range option, you can type nonconsecutive ranges, such as **1-4, 7, 10-13, 15, 18, 20**. If you want to print from a specific page to the end of the document, just type the hyphen after the initial page number, such as **4-**. InDesign figures out what the last page is. Similarly, to start from the first page and end on a specified page, just start with the hyphen, as in **-11**. InDesign lets you type absolute page numbers in the Range field. For example, typing **+6-12** would print the document's 6th through 12th pages, no matter what their page numbers are.
- ✓ Selecting the Spreads option prints facing pages on the same sheet of paper, such as putting two letter-size pages on one 11-x-17-inch sheet. This is handy when showing clients proposed designs, but make sure you have a printer that can handle a large paper size or that you scale the output down to fit (through the Setup pane, which I cover in the following section).



- ✓ The Options section lets you print various layout components that you typically don't want in final output but might be useful when sharing comps and other in-progress printouts with others, such as baseline grids and nonprinting objects such as formatting notes.
- ✓ A new control in the Options section is the Print Layers pop-up menu, which gives you additional control over how layers are marked as nonprinting print. It used to be that if you marked a layer as nonprinting, you would have to leave the Print dialog box to open the Layers panel to make it printable. Now, you can skip that step and override layers' nonprinting status using this pop-up menu. The default option, Visible & Printable Layers, honors your layers' printing status. Visible Layers prints all visible layers, including those marked as nonprinting. All Layers prints both visible and hidden layers, including those marked as nonprinting. (See Chapter 5 for more on layers.)

The Setup pane

The Setup pane is where you tell InDesign how to work with the paper (or other media, such as film negatives) to which you're printing. The options are straightforward, so I just highlight a few notes and tips:

- ✓ **Custom paper size:** Choosing some printer models will in turn let you choose a Custom option in the Paper Size pop-up menu, in which case you type the dimensions in the Width and Height fields, as well as position the output through the Offset and Gap fields. These latter two options are usually used when printing to a roll, such as in an imagesetter using photo paper (called *RC paper*, a resin-coated paper that keeps details extremely sharp), so you can make sure there is space between the left edge of the roll and the page boundary (the offset), as well as between pages (the gap). Most printers can't print right to the edge, thus the Offset setting. You also want a gap between pages for crop and registration marks, as well as to have room to physically cut the pages.
- ✓ **Transverse option:** Don't use the Transverse option, which rotates the output 90 degrees, unless your service bureau or production department tells you to. Otherwise, you might have your pages cut off on the final negatives.
- ✓ **Tile options:** Use the Tile options to print oversized documents. InDesign breaks the document into separate pages — called *tiles* — that you later can assemble together. To enable tiling, select the Tile check box, and then choose the appropriate option from the adjoining pop-up menu:

- **Manual:** This lets you specify the tiles yourself. To specify a tile, you change the origin point on the document ruler, and the new origin point becomes the upper-left corner of the current tile. (To change the origin point, just drag the upper-left corner of the rulers to a new position in your document.) To print multiple tiles this way, you need to adjust the origin point and print, adjust the origin point to the next location and print, and so on, until you're done.
- **Auto:** This lets InDesign figure out where to divide the pages into tiles. You can change the default amount of overlap between tiles of 1.5 inches by using the Overlap field. The overlap lets you easily align tiles by having enough overlap for you to see where each should be placed relative to the others.
- **Auto Justified:** This is similar to Auto except that it makes each tile the same size, adjusting the overlap if needed to do that. (The Auto option, by contrast, simply starts at the origin point and then does as much of the page as will fit in the tile, which means the last tile may be a different width than the others.) You can see the difference between the two by watching how the page preview window at left changes as you select each option.

The Marks and Bleed pane

The Bleed and Slug area of the Marks and Bleed pane controls how materials print past the page boundary. A bleed is used when you want a picture, color, or text to go right to the edge of the paper. Because there is slight variation on positioning when you print because the paper moves mechanically through rollers and might move slightly during transit, publishers have any to-the-edge materials actually print beyond the edge, so there are never any gaps. It's essentially a safety margin. A normal bleed margin would be 0p9 ($\frac{9}{32}$ inch), although you can make it larger if you want.

A *slug* is an area beyond the bleed area in which you want printer's marks to appear. The reader never sees this, but the workers at the commercial printer do, and it helps them make sure they have the right pages, colors, and so on. Like the bleed, the slug area is trimmed off when the pages are bound into a magazine, newspaper, or whatever. (The word *slug* is an old newspaper term for this identifying information, based on the lead slug once used for this purpose on old printing presses.) The purpose of the slug is to ensure there is enough room for all the printer's marks to appear between the bleed area and the edges of the page. Otherwise, InDesign will do the best it can.

It's best to define your bleed and slug areas in your document itself when you create the document in the New Document dialog box (choose File⇨New⇨Document or press ⌘+N or Ctrl+N), as covered in Chapter 3. You can also use the Document Setup dialog box (choose File⇨Document Setup or press Option+⌘+P or Ctrl+Alt+P). The two dialog boxes have the same options; if they don't show the Bleed and Slug section, click More Options to see it.

But if you didn't define your bleeds previously, you can do so in the Print dialog box's Marks and Bleed pane. You can also override those New Document or Document Setup document settings here. To use the document settings, select the Use Document Bleed Settings option. Otherwise, type in a bleed area by using the Top, Bottom, Left, and Right fields. If you want the four fields to be the same, click the broken-chain iconic button to the right of the Top field; it becomes a solid chain, indicating that all four fields will have the same value if any is modified. Any bleed area is indicated in red in the preview pane at the bottom left.

If you want to set the slug area, select the Include Slug Area option. InDesign then reserves any slug area defined in the New Document or Document Setup dialog box. You can't set up the slug area in the Print dialog box.

The Output pane

The next pane is the Output pane, which controls the processing of colors and inks on imagesetters, platesetters, and commercial printing equipment. For proof printing, such as to a laser printer or an inkjet printer, the only option that you need to worry about is on the Color pop-up menu, which controls whether the colors print as color or as grayscale.



The options in the Output pane are for experts and should be specified in coordination with your service bureau and commercial printer — these options can really mess up your printing if set incorrectly.

One area that you should set is in the Ink Manager dialog box. Accessed by clicking Ink Manager, the Ink Manager dialog box, shown in Figure 25-3, gives you finer controls over how color negatives output. If any colors should have been converted to process color but weren't, you have three choices:

- ✓ **Click the spot color iconic button.** You can override the spot color in the Ink Manager dialog box by clicking this button (a circle icon) to the left of the color's name. That converts it to a process color. (Clicking the process color button, a four-color box icon, converts a color back to a spot color.) This is the way to go for a quick fix.

- ✔ **Make the spot color a process color instead.** Do this by closing the Ink Manager and Print dialog boxes, and editing the color that was incorrectly set as a spot color in the Swatches panel (choose Window⇧⇧ Swatches or press F5) as I cover in Chapter 7. This ensures that the color is permanently changed to a process color for future print jobs.
- ✔ **Convert all spot colors to CMYK process equivalents.** Do this by selecting the All Spots to Process option. This is the easiest method to make sure you don't accidentally print spot-color plates for a CMYK-only document.

The other Ink Manager options are for experts and should be changed only in consultation with your service bureau, production department, and/or commercial printer.

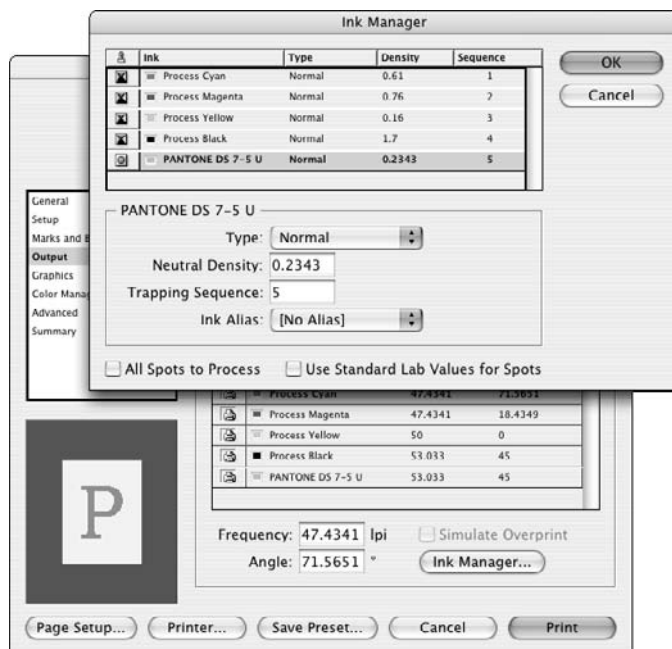


Figure 25-3:
The Ink
Manager
dialog box.

The Graphics pane

By using the Graphics pane, you control how graphics are printed and how fonts are downloaded. The options here are meant for professional printing, such as to imagesetters, in situations where you're working with a service bureau or in-house printing department. This is also an expert area, so change these settings only after consulting with an experienced pro.

The Color Management pane

The Color Management pane is where you manage color output (apply color calibration). Most options should be changed only in consultation with your service bureau or production department.

One option you should be able to change on your own is Printer Profile. Use this pop-up menu to select the device to which the document will ultimately be printed. This is by default the same as the profile selected in the Edit Color Settings dialog box, which I cover earlier in this chapter, in the section “Calibrating Color.”

The Advanced pane

The options in the Advanced pane let you control graphics file substitutions in an Open Prepress Interface (OPI) workflow and also set transparency flattening, which controls how transparent and semitransparent objects are handled during output. Again, these are expert options you should change only in consultation with your service bureau or production department.

The Summary pane

The final Print dialog box pane is the Summary pane. It simply lists your settings all in one place for easy review. The only option — Save Summary — saves the settings to a file so you can include it with your files when delivering them to a service bureau or for distribution to other staff members so they know the preferred settings.

Creating a Document Package

Have you ever given a page-layout document to a service bureau only to be called several hours later because some of the files necessary to output your document are missing? If so, you’ll love the Package feature in InDesign.

This command, which you access by choosing File⇨Package or pressing Option+Shift+⌘+P or Ctrl+Alt+Shift+P, copies into a folder all the font, color-output, and graphics files necessary to output your document. It also generates a report that contains all the information about your document that a service bureau is ever likely to need, including the document’s fonts, dimensions, and trapping information. You can also create an instructions file that has your contact information and any particulars you want to say about the document.

When you run the Package command, InDesign preflights your document automatically and gives you the option of viewing any problems it encounters. If you elect to view that information, the Preflight dialog box appears. You can continue to package your document from that dialog box by clicking Package after you assure yourself that none of the problems will affect the document's output. If it finds no problems during the automatic preflighting, InDesign will not display the Preflight dialog box.

Before you can actually package the document, InDesign asks you to save the current document, and then fill in the Printing Instructions form. You can change the default filename from Instructions.txt to something more suitable, such as the name of your print job. Often, you'll leave the printing instructions blank — use the form only if you have *special* instructions.



If you *don't* want to create an instructions form, don't click Cancel — that cancels the entire package operation. Just click Continue, leaving the form blank. Similarly, you must click Save at the request to save the document; clicking Cancel stops the package operation as well.

The next step is to create the package folder. You do this in the dialog box that follows the Printing Instructions form, which on the Mac is called Create Package Folder and in Windows is called Package Publication. Figure 25-4 shows the Mac version, which except for the name at the top is the same as the Windows version.

Figure 25-4:
The Create Package Folder dialog box for Mac is called the Package Publication dialog box in Windows.



In the dialog box, you can select what is copied: the fonts, color-output profiles, and *linked graphics* (graphics pasted into an InDesign document rather than imported are automatically included). You can also tell InDesign to update the graphics links for those that were modified or moved; if this Update Graphic Links in Package option isn't selected, any missing or modified graphics files won't be copied with the document.

You can tell InDesign to include fonts and links from hidden layers (which you would do only if you want the service bureau to print those hidden layers or if you were giving the document's files to a colleague to do further work).

You also can specify whether the document should use only the hyphenation exceptions defined within it. This often makes sense because it ensures that the printer's hyphenation dictionary — which may differ from yours — doesn't cause text to flow differently.

Finally, you can choose to view the report after the package is created — on the Mac, InDesign launches TextEdit and displays the report file, and on Windows it launches Notepad and displays the report file.

Click Save (on the Mac) or Package (in Windows) when everything is ready to go. Your document is placed in the folder you specify, as is the instructions file (the report). Inside that folder, InDesign will also create a folder called Fonts that includes the fonts, a folder called Links that has the graphics files, and a folder called Output Profiles that has the color output profiles.

I strongly recommend using the Package feature. It ensures that your service bureau has all the necessary files and information to output your document correctly.

Exporting PDF Files

Sometimes you want to create a PDF file for distribution on the Web, on a CD, on a corporate intranet, or even by e-mail. PDF creation is a really easy task in InDesign. First choose File⇒Export or press ⌘+E or Ctrl+E. The Export dialog box appears, which, like any standard Save dialog box, lets you name the file and determine what drive and folder the file is to be saved in. The key control in the Export dialog box is the Formats pop-up menu, where you choose the format (in this case, Adobe PDF). Then click Save.



If you're working with the InDesign book feature (see Chapter 23), you can export the book's chapters to PDF files from an open book's panel by using the Export Book to PDF option in its flyout menu. (If one or more documents in the book are selected in the panel, the menu option changes to Export Selected Documents to PDF.) The setup options are the same as for exporting individual documents.

After you select Adobe PDF in the Export dialog box's Formats pop-up menu and give the file a name and location in the File Name and Save in areas, click Save to get the Export Adobe PDF dialog box shown in Figure 25-5. The dialog box has six panes; the General pane is displayed when you open the dialog box. There are several options that are accessible from all six panes.

If you know how to use Acrobat Professional, you know how to set up your PDF export. If not, it's best to consult with a local expert because PDF export options are as complex and job-specific as the print options I cover earlier.

Common options

There are some basic options available in all the panes that you should feel comfortable setting on your own:

- ✔ **Adobe PDF Preset pop-up menu:** This pop-up menu lets you select from both predefined sets of PDF-export settings (similar to the printer presets covered earlier in this chapter), as well as any presets you or someone else may have created.
- ✔ **Compatibility pop-up menu:** This pop-up menu lets you choose which PDF file version to save the file as. Your options are Acrobat 4 (PDF 1.3), Acrobat 5 (PDF 1.4), Acrobat 6 (PDF 1.5), Acrobat 7 (PDF 1.6), and Acrobat 8 (PDF 1.7). Choosing Acrobat 4 (PDF 1.3) is the best option for documents that you want to distribute on CD or over the Web because it ensures the broadest number of people will be able to view the file. But it also limits the ability to use some features, particularly those that protect the document from unauthorized usage such as copying its contents. Choose a later version only if you're certain that your intended recipients use that version of Acrobat or Acrobat Reader. For example, if your company has standardized on Acrobat 6 and the document will be used only internally, picking the Acrobat 6 (PDF 1.5) option makes sense. Likewise, if you're sending the PDF file to a service bureau, use the version of Acrobat that the service bureau uses because later versions of Acrobat support more features, especially for commercial printing. (PDF formats 1.5 and later, for example, support native transparency.)
- ✔ **Save Preset button:** Click this to save any settings made in the Export Adobe PDF dialog box as a new preset. (You can also define new PDF presets by choosing File⇨PDF Export Presets⇨Define.)
- ✔ **Export button:** Click this to create the PDF file based on the settings that you selected in the various panes.

Using Distiller job options

InDesign also lets you import settings from Acrobat Distiller job-options files, which are similar to InDesign's PDF presets but are created in the Adobe Acrobat Professional software. You can load such job-option files by clicking Load in the Adobe PDF Presets dialog box (choose File⇨PDF Export Presets⇨Define).

You can use the Adobe PDF Presets dialog box to create and edit the job-option files for sharing

with Acrobat Distiller (part of Acrobat Professional) and other Creative Suite users; just click Save when you're done. When creating or editing these PDF presets, you get the same options that I describe elsewhere in this section for the Export Adobe PDF dialog box.

The General pane

Use the General pane, shown in Figure 25-5, to determine what is exported. The Pages option gives you the same flexibility as the Print dialog box's Pages option, which I cover in the earlier section "Choosing Print Options." Similarly, the Spread option works like the same-name option in the Print dialog box.

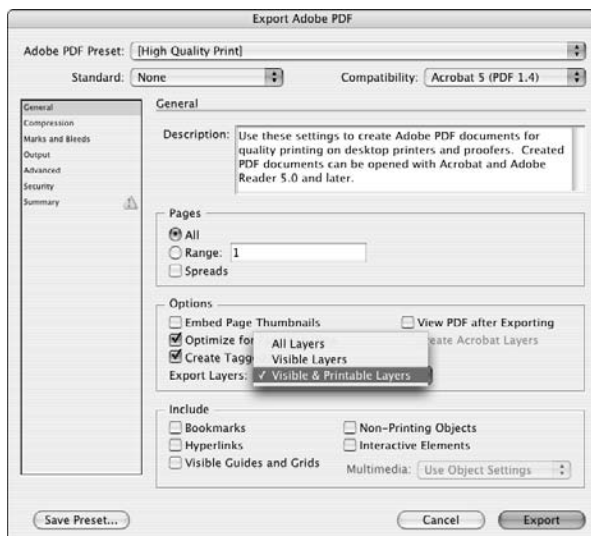


Figure 25-5:
The General
pane of the
Export
Adobe PDF
dialog box.

In the Options section, you can select the following options:

- ✔ **Embed Page Thumbnails:** Select this option if you're creating a PDF file to be viewed on-screen. Thumbnails help people to more easily navigate your document in the Adobe Reader program. However, if you're sending the PDF files to a service bureau or commercial printer for printing, you don't need to generate the thumbnails.
- ✔ **Optimize for Fast Web View:** Always select this option — this minimizes file size without compromising the output.
- ✔ **Create Tagged PDF:** Select this option to embed XML tag information into the PDF file. This is useful for XML-based workflows and Adobe eBooks. If you don't know what XML or eBooks are, you don't need to select this option.
- ✔ **View PDF after Exporting:** Select this option if you want to see the results of the PDF export as soon as the export is complete. Typically, however, you shouldn't select this option because you likely will have other things you want to do before launching Adobe Reader (or the full Acrobat program, if you own it) to proof your files.
- ✔ **Create Acrobat Layers:** If you selected Acrobat 6 (PDF 1.5) or later in the Compatibility pop-up menu, you can select this option, which outputs any InDesign layers to separate layers in Acrobat. (Acrobat 6 was the first version of Acrobat to support layers.) If you choose a different Compatibility option, Create Acrobat Layers is grayed out.
- ✔ **Export Layers:** This new pop-up menu gives you additional control over how layers marked as nonprinting are exported to the PDF file. It used to be that if you marked a layer as nonprinting, you would have to leave the Export Adobe PDF dialog box to open the Layers panel to make it exportable. Now, you can skip that step and override layers' nonprinting status using this pop-up menu. The default option, Visible & Printable Layers, honors your layers' printing status. Visible Layers exports all visible layers, including those marked as nonprinting. All Layers exports both visible and hidden layers, including those marked as nonprinting. (See Chapter 5 for more on layers.)



In the Include section, you set what elements of the document are included in the PDF file. You can select the following options:

- ✔ **Bookmarks:** This takes InDesign table-of-contents (TOC) information and preserves it as bookmarks in the exported PDF file.
- ✔ **Hyperlinks:** This preserves any hyperlinks added in InDesign. Otherwise, the hyperlinks are converted to standard text in the PDF file. (Chapter 22 explains how to create hyperlinks in InDesign.)

- ✔ **Visible Guides and Grids:** This includes the on-screen guides and grids in the output version — an option you'd use only when creating PDF files meant to be used as designer examples, not for readers or for prepress.
- ✔ **Non-Printing Objects:** This includes any objects marked as Nonprinting through the Attributes pane (choose Window⇨Attributes).
- ✔ **Interactive Elements:** This preserves interactive objects such as buttons rather than convert them to static graphics.
- ✔ **Multimedia:** This pop-up menu lets you control how embedded sound and video are handled. This option is available only if you choose Acrobat 6 (PDF 1.5) or later in the Compatibility pop-up menu. The options are Use Object Settings, Link All, or Embed All. In InDesign, you can embed a sound or movie file, or link to one. This option lets you override the individual settings and make all such objects embedded or linked.

The Compression pane

All the options in this pane compress your document's graphics. For documents you're intending to print professionally, make sure that for the Color, Grayscale, and Monochrome image types, the No Sampling Change option is selected, and that Compression is set to None. You don't want to do anything that affects the resolution or quality of your bitmap images if you're outputting to a high-resolution device.

But it's fine to select the Crop Image Data to Frames option because this discards portions of pictures not visible on-screen, reducing file size and reducing processing time during output. (Imagesetters and other devices usually have to process the entire image, even if only part of it is actually printed.)

You can also select the Compress Text and Line Art option. It compresses vector graphics (both imported and those created in InDesign) as well as text, but does so without affecting output quality.

For the rest, stick with the defaults based on the preset you chose, or check with your production department.

Marks and Bleed pane

The Marks and Bleed pane in the Export Adobe PDF dialog box works just like the Marks and Bleed pane in the Print dialog box, which I cover earlier in this chapter.

The Output pane

The Output pane has two sections — Color and PDF/X — where you control color calibration. Adjust these only if you're creating a PDF file meant to be used by a service bureau to print the final document on paper or to create plates for commercial printing. Ask the people at your service bureau what settings they prefer for this pane's options.

The Advanced pane

The Advanced pane in the Export Adobe PDF dialog box has the same options as the Advanced pane in the Print dialog box, which I cover earlier in this chapter. Like the Output pane, these options are relevant only if you're generating a PDF file that your service bureau or commercial printer will use to create the final printed output from.

Security pane

The Security pane, shown in Figure 25-6, has no relevance to documents intended to be output at a service bureau or commercial printer, so make sure the Require a Password to Open the Document and the Use a Password to Restrict Printing, Editing, and Other Tasks options are not selected in that case.

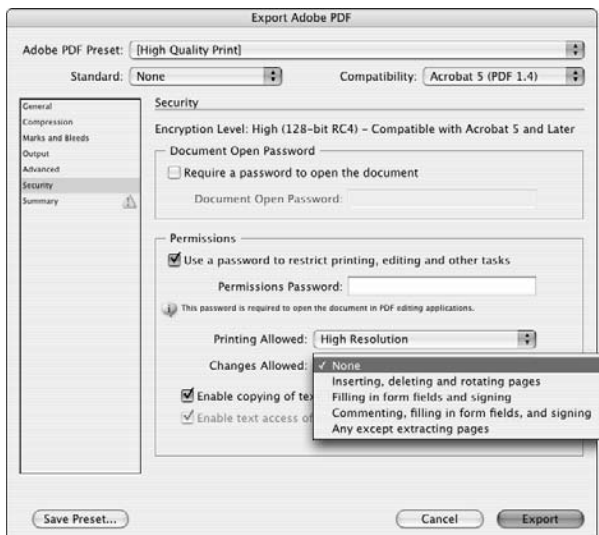


Figure 25-6:
The Security
pane of the
Export
Adobe PDF
dialog box.

These settings are useful if you're publishing the document electronically because they control who can access the document and what they can do with the document once it's open. Here's how these settings work:

- ✔ **Encryption Level:** This section's options depend on the option set in the Compatibility pop-up menu; Acrobat 5 (PDF 1.4) and higher use High (128-Bit RC4) encryption, while earlier versions use 40-bit RC4.
- ✔ **Document Open Password:** In this section of the Security pane, you can require a password to open the exported PDF file by selecting this option and typing a password in the associated text field. If you don't type a password here, you're forced to type one in a dialog box that appears later. To access protected content, recipients must use the Security pane in Acrobat (choose File→Document Properties or press ⌘+D or Ctrl+D).
- ✔ **Permissions:** Here, you determine what restrictions to place on the PDF file. Note that the options will vary based on what version of the PDF format you selected in the General pane.
 - **Use a Password to Restrict Printing, Editing, and Other Tasks:** You can restrict recipients' actions by selecting this option and then specifying permissible actions by using the Printing Allowed and Changes Allowed pop-up menus, as well as selecting from among the options that follow (the number of options displayed varies based on the preset chosen). You can also require a password to allow editing of the file in another application. Your management options include the following:
 - **Printing Allowed:** You can select None, Low-Resolution (150 dpi), or High Resolution. You would disable printing to ensure that the material can be read only on-screen.
 - **Changes Allowed:** You can select None; Inserting, Deleting and Rotating Pages; Filling in Form Fields and Signing; Commenting, Filling in Form Fields, and Signing; or Any Except Extracting Pages. (*Signing* means using digital signatures to verify sender and recipient identities.)
 - **Enable Copying of Text, Images, and Other Content:** If it's okay for recipients to use the PDF file's objects, select this option.
 - **Enable Text Access of Screen Reader Devices for the Visually Impaired:** If you want the file to be accessible to visually impaired recipients who use text-reader applications, select this option. This option is available only if you are exporting to Acrobat 5 (PDF 1.4) or later.
 - **Enable Plaintext Metadata:** For documents with *metadata* — authoring information associated with XML documents and Web pages — you can make that metadata visible to Web-based search engines and similar applications by selecting this option. This option is available only if you are exporting to Acrobat 6 (PDF 1.5) or later.

Settings for on-screen usage

If your output is destined for use on a monitor — such as from CD, on the Web, or in a corporate intranet — use these settings when exporting to PDF files:

- ✓ In the General pane, select the Optimize for Fast Web View option. Also, check Spreads if your facing pages are designed as one visual unit.
- ✓ In the Compression pane, change the two Image Quality pop-up menus to Low. Also, choose any of the Downsampling or Subsampling menu options in all three image types' sections. The pixels-per-inch (ppi) value should be either 72 (if you intend people just to view the images on-screen) or 300 or 600 (if you expect people to print the documents to a local inkjet or laser printer). Pick the ppi value that best matches most users' printers' capabilities. For the Compression pop-up menus, choose Automatic (JPEG) for the color and grayscale bitmaps, and CCITT Group 4 (the standard method for fax compression) for black-and-white bitmaps. Set Quality to

Maximum for color and grayscale bitmaps. Finally, select the Compress Text and Line Art option.

- ✓ In the Marks and Bleeds pane, make sure no printer's marks are selected.
- ✓ In the Security pane, select the security features (Document Open Password and Permissions) and the options for which you want to add security. Uncheck the Enable Copying of Text and Graphics option to prevent readers from copying and pasting your content, and select None from the Printing Allowed pop-up menu to prevent printing. The Changes Allowed pop-up menu options control whether readers can add extra pages, add comments to the file, fill in forms, delete pages, or rotate pages. Typically, you'd choose either Filling in Form Fields and Signing (so readers could complete forms) or Commenting, Filling in Forms, and Signing (so readers can complete forms and add their own comments) — both options keep the user from accessing the underlying content of your PDF files.

The Summary pane

The final Export Adobe PDF dialog box pane is the Summary pane, which simply lists your settings all in one place for easy review. The only option — Save Summary — saves the settings to a file so you can include it with your files when delivering them to a service bureau, or for distribution to other staff members so they know the preferred settings.

Exporting to the Web



InDesign CS3 now lets you export your layouts to the XHTML format that Web editors such as Adobe's Dreamweaver and GoLive can open for further work. (Note that you'll usually want to do further work in a Web editor both to take advantage of Web-specific formatting options and to rework the layout to

better fit the horizontal “page” size of a Web browser.) With InDesign CS3’s newfound ability to export to the XHTML format, not just create an XML version specific to Adobe’s GoLive Web editor, as in previous versions, you can more easily create Web pages based on print documents.



XHTML is a version of the well-known Hypertext Markup Language (HTML) format that adds more consistent structure to make it easier to present pages consistently across Web editors and browsers. You probably didn’t even know that your Web editor was creating XHTML-formatted Web pages when you saved your pages, but any Web editor worth its salt has been doing that for a few years now.

To export a layout to XHTML format, simply choose **File**⇨**Cross-Media Export**⇨**XHTML/Dreamweaver**. (And despite the name, your files are not limited to use by Adobe’s Dreamweaver software.) If you want to export just specific items on a page, select them with one of the selection tools before choosing this menu option.

You’ll get the **Save As** dialog box, where you choose the disk and folder to store the exported Web page, as well as the page’s filename. After you click **Save**, you’ll get the **XHTML Export Options** dialog box, shown in Figure 25-7, in which you specify how InDesign converts the layout to the Web format. Unless you’re Web-savvy, ask your Web master what settings to use:

- ✓ In the **General** pane, you choose whether to export the currently selected objects or the entire document, as well as how to handle bulleted and numbered lists. The default mappings — **Map to Unordered Lists** for bullets and **Map to Ordered Lists** for numbers — work for most sites. But you can also have InDesign convert either or both such lists into plain text rather than using the Web’s list functions.
- ✓ In the **Images** pane, you choose how your images are converted to the Web’s GIF and JPEG formats, selecting options such as image quality and color palette.
- ✓ In the **Advanced** pane, you set how text formatting is converted to the Web’s version of styles, called *cascading style sheets*, or **CSS**. It’s preferable to choose **External CSS** as the export option, since that choice has the Web pages use a single style file that all Web pages can refer to, ensuring consistency (much like InDesign’s styles offer). Note that InDesign does not create a CSS file for you; you or your Web designer must create it in a Web editing program. Also in this pane, you can specify an external JavaScript file to link to — again, something your Web designer or programmer will have created separately.

Click **Export** when done with your settings.



Figure 25-7:
The Images
pane of the
XHTML
Export
Options
dialog box.

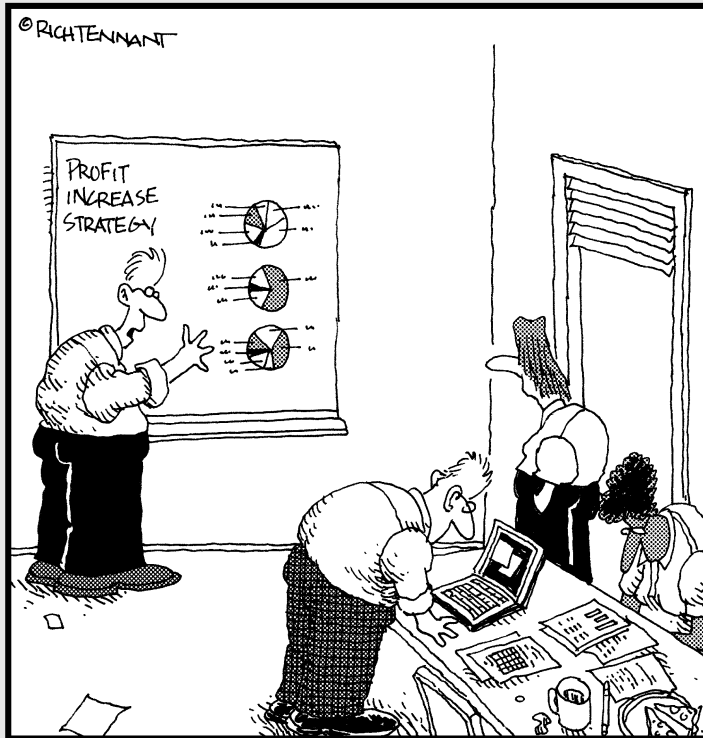
The export process is simple, so it's easy to forget that converting print layouts to the Web's format is rarely a "point and shoot" activity. Expect your Web designer to do major work on those exported pages in his or her Web editing program, to optimize them for the Web environment. That's no reflection on you or InDesign, just the reality of working in different media.

Part VIII

The Part of Tens

The 5th Wave

By Rich Tennant



"Look-what if we just increase the size of the charts?"

In this part . . .

This part of the book was what inspired David Letterman's Top 10 lists. Well, it could have! Forget about slogging through the details. Here, you get the quick hits on everything from the coolest new features, the best resources to augment your InDesign IQ, and what you need to keep at the top of your mind if you're switching from QuarkXPress or PageMaker. Think of it as popcorn from a book!

Chapter 26

Top Ten New Features in InDesign CS3

In This Chapter

- ▶ Interface changes
 - ▶ Working with layout elements
 - ▶ Text controls
-

Admit it — you came here before looking at the rest of the book. I can't blame you — we all love to know what's new. Well, InDesign CS3 has a lot of new stuff. Much of it falls into the category of nice little touches that make something that much easier to use. But there are also a bunch of “hey, let's see what the users can do with this” kind of new thing just to keep everyone's brain sharp. You'll have your favorite new features, of course, but because I'm writing the book, I get to tell you mine!

Interface Changes

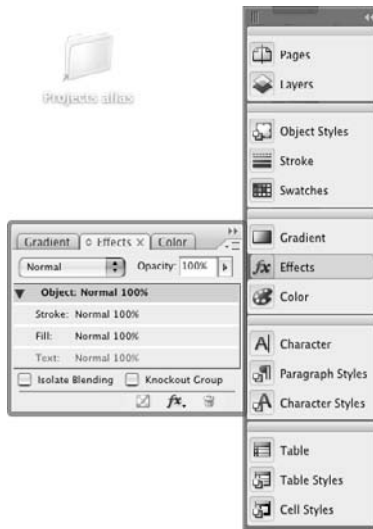
If there's one thing I hate, it's a program that changes its user interface on every version, just for the sake of change. That just makes me relearn what I was already good at, without making me more productive. I wasn't exactly thrilled when I heard Adobe was changing the Creative Suite interface again.

Collapsing panels

But one interface change has wormed its way into my heart: the collapsing panels. (Set them by enabling the Auto-Collapse Icon Panels 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.)

The various panels at the side of the monitor remain easy to access with a click of their names, and when you select a different panel, the last one you worked on just slides back to the side of the monitor. As Figure 26-1 shows, that saves clutter and does some work for me. Neat!

Figure 26-1:
Collapsed panels let you work with just one at a time, without taking all your screen real estate.



Page previews

InDesign CS3 now shows a preview image of your pages in the Pages panel. That makes it easy to figure out what page you want to go to, thanks to the visual reminder of what's on each page. Plus this new feature works inside a panel you're using a lot anyhow, so it's not taking up more screen space, like the Navigator panel does (the previous way to get this visual aid).

You can control whether these page previews 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.

Faster tool switching

InDesign CS3 introduces a quick new way to switch between the Selection tool and the Direct Selection tool: Just double-click an object.

Working with Layout Elements

Object manipulation is at the heart of what a layout program does, so it's no surprise there are some very cool additions in this area of InDesign.

Master-page import

This may seem like a “Doh! Why didn't they think of that already?!” feature — and it is. But it's still wonderful to have: The ability to import master pages. Before, you had to create a new master page in your document, and then copy the elements from another document using old-fashioned copy-and-paste. That's a lot of work!

A nice touch is that 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 appears, 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. Likewise, InDesign will also alert you if the imported master pages use different dimensions than the current document's pages.

Object-level search

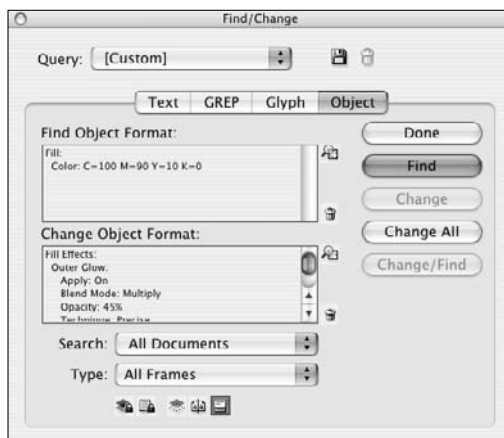
A really painstaking task in any layout is going through it to fix formatting to frames, lines, or other objects once the design standards have changed. Previous versions of InDesign delivered one way to ease that burden — the object styles feature described in Chapter 10 — but even if you use these styles, you will still have local formatting applied to at least some objects that can be a real pain to change throughout a layout.

That's where the Object pane of the Find/Replace dialog box comes in. It lets you replace attributes throughout your document, no matter what they are applied to, using the familiar approach of search and replace. (Figure 26-2 shows that pane.) This is another of those “Well, that seems obvious” features that for some reason never was obvious in the 20-plus-year history of desktop publishing software.

Reusable saved search queries

Bonus points for the new ability to save your searches — of objects, text, or special characters — so you can reuse them over and over!

Figure 26-2: Search and replace now handles object attributes. That'll ease your workload!



Lighting effects

No, you're not using Photoshop. It really is InDesign CS3 that lets you apply rich 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 pane to the Effects panel.

And not only are there a bunch of new lighting effects — inner shadow, outer glow, inner glow, bevel and emboss, satin, directional feather, and gradient feather — that you can apply individually or in combination, but InDesign now also lets you apply these lighting effects to your choice of an object's frame, fill, or contents. You could get carried away and create altered-state kinds of layouts, but I know you can control yourself. Figure 26-3 shows some examples.

Multiple file placement

You can now select multiple files — text and/or graphics — by Shift+clicking a range or ⌘+clicking or Ctrl+clicking multiple files one by one in the Place dialog box. Just click once for each file imported, or Shift+⌘+click or

Ctrl+Shift+click to have InDesign place all files on the page in separate frames. The loaded-text icon or loaded-graphics icon will show the number of files to be placed — as well as a mini preview of each file so you know what you're placing at each step!

Plus, you can move through these icons using the left- and right-arrow keys, so you can place these files in any order you want, not just in the order you selected them originally.



Figure 26-3:
Examples of
InDesign's
many new
lighting
effects.
Who needs
Photoshop?

Text Controls

The other heart of publishing is text: the typographic and other manipulations of words on the page that make them more than mere words on a page. InDesign has long been super-powerful on the typographic front, so it's cool that new capabilities in the text arena appear in other aspects of text handling — just to keep us from thinking that typography is all there is when it comes to text!

Text variables

With InDesign CS3's new text variables, you can define an unlimited number of text variables that InDesign will happily update across your documents whenever you change them or your layout does. This capability may seem prosaic, boring even. But it's just the opposite.

Don't be surprised to find yourself having InDesign automatically update your page folios with chapter and section information, ensuring that the publication dates for the hundreds of reports you have to manage are always correct, and even that the issue date is correct across all your magazine's pages. That's the power of variable text!

Style groups

To help you find the desired style in documents that have dozens of them, InDesign now lets you create style groups, which create a folder in the various styles panels' style list that you can open and close as desired. I realize that this appeals to the "I love to organize" set — not the majority of free-thinking designers whose style lists are littered with duplicate styles with inconsistent names that meant something last week but not today. I'm not that organized — I've never used a day planner, for example, and my filing system is really a Post-its-and-piles system — but I hate searching for things I use a lot. So style groups seem really cool to me, a way to put the styles I use a lot in one place where I might actually find them! Give them a whirl.

Chapter 27

Top Ten (Or So) Resources for InDesign Users

In This Chapter

- ▶ Discovering useful Web sites
 - ▶ Using Adobe Web resources
 - ▶ Finding books to read
-

When you're ready to expand your horizons beyond what I can squeeze into the pages of this book, check out this chapter. No matter what type of information you're looking for, you can find it here among this handy list of InDesign resources.

Web Sites

Web sites are a great on-going resource because they let you keep up with news, techniques, and product versions. Here are four sites that belong in your bookmarks.

InDesignCentral

www.indesigncentral.com

To help you keep up with the dynamic field of publishing, I've created an independent Web site that helps InDesign users stay current on tools and techniques. InDesignCentral provides the following resources:

- ✔ **Tools:** Links to plug-ins, scripts, utilities, and Adobe downloads.
- ✔ **Tips:** My favorite tips, as well as reader tips.

- ✓ **Resources:** Print publishing links, Web publishing links, Mac OS X links, and Windows links.
- ✓ **Adobe InDesign Bible series and QuarkXPress to InDesign: Face to Face:** Excerpts from the books, including updates from after the books' releases and color versions of the screen images from the chapters that cover color.

Figure 27-1 shows the site's home page.



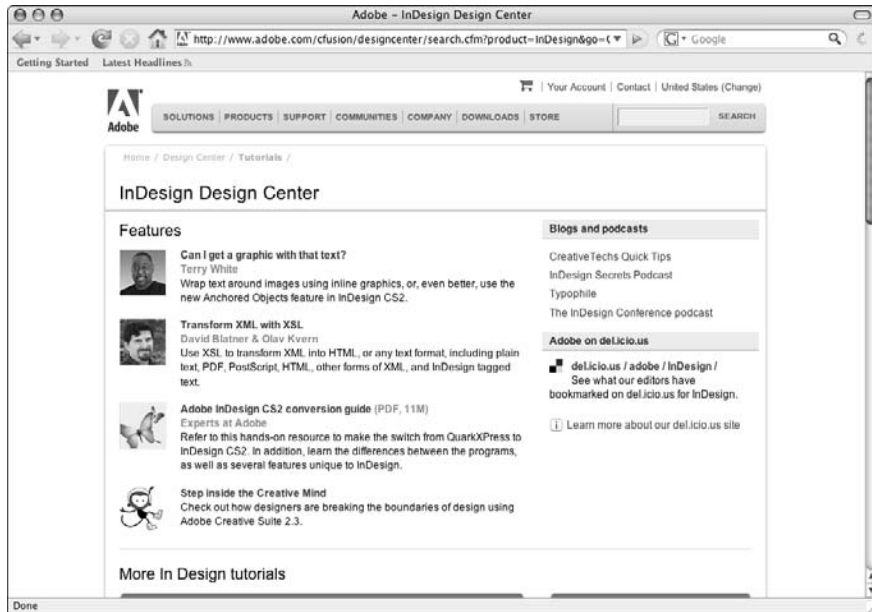
Figure 27-1:
Visit
InDesign-
Central for
useful tips
and tricks.

The Adobe Web site

www.adobe.com

The friendly people at Adobe, who gave the world InDesign, recognize the value in providing useful information for users of their software solutions. The Adobe Web site offers InDesign tips and tricks, guides, interactive tutorials, and lists of user groups. It's worth your while to visit the site now and then to see what's new. Be sure to check out the InDesign community area for pro tips and help from users just like you. Figure 27-2 shows an InDesign-related page from the Adobe site.

Figure 27-2:
At the Adobe Web site, you can find useful information on InDesign, such as the tips page shown here.



InDesign User Group

www.indesignusergroup.com

Seeking to help InDesign users share skills and tips, Adobe is supporting local user groups in many cities. Here's your chance to extend your InDesign knowledge and enlarge your personal network of graphics and layout experts.

You can also find links to several how-to guides from Adobe.

Creativepro

www.creativepro.com

Looking for the latest product and industry news? Go to Creativepro.com, an online magazine that also functions as a resource and reviews center.

Magazine Resources

The Web has revolutionized content delivery, but a good old-fashioned magazine is hard to beat for the richness of its information and the ability to take advantage of its knowledge almost anywhere you happen to be.

InDesign Magazine

<http://www.indesignmag.com>

This PDF-delivered bimonthly magazine takes the expertise of a whole bunch of InDesign power users and puts it into one place, giving you a regular flow of great ideas, tips, and tricks. While it's not as convenient as a print magazine, the PDF format does have the advantage of being easy to store and keep with you wherever your computer happens to be.

Layers magazine

www.layersmagazine.com

A great resource for tips and tricks specific to the Adobe universe of products is *Layers* magazine, which produces six glossy issues each year, chock-full of tips and how-to advice.

Macworld magazine

www.macworld.com

Macworld magazine remains a spectacular resource for publishers of all skill levels, providing graphics guidance as well as general news and advice about the Mac platform that most designers use.

Recommended Books

Wiley Publishing, Inc., the publisher of this book, also offers a wide range of books to help layout artists and publication designers exploit publishing tools to the fullest. The following four books could be of great use to you to expand your InDesign knowledge and related areas of expertise:

- ✔ *Adobe InDesign CS3 Bible*, by Galen Gruman, gives you extensive insight and tips on using the newest versions of InDesign in professional publishing environments.
- ✔ *QuarkXPress to InDesign: Face to Face*, also by Galen Gruman, shows you how to make the move from QuarkXPress to InDesign. You'll be running at full speed in no time, leveraging your knowledge of QuarkXPress and translating it into InDesign's approach.
- ✔ *Adobe Creative Suite 3 Bible*, by Ted Padova, Kelly L. Murdock, and Wendy Halderman, provides an all-in-one resource for users of Adobe's cornerstone tools (Photoshop, Illustrator, Acrobat Professional, and InDesign).
- ✔ *Digital Photography: Top 100 Simplified Tips & Tricks*, by Gregory Georges, provides clear, illustrated instructions for 100 tasks that reveal cool secrets, teach time-saving tricks, and explain great tips to make you a better digital photographer. To help you understand the implications of digital photography on the production process, *Total Digital Photography: The Shoot to Print Workflow Handbook*, by Serge Timacheff and David Karlins, offers complete, end-to-end workflow advice from shoot to print in a full-color presentation.

Chapter 28

Top Ten Must-Knows for QuarkXPress Refugees

In This Chapter

- ▶ Transferring QuarkXPress files to InDesign
 - ▶ Understanding what works differently
-

You've jumped on the InDesign bandwagon after seeing everything it can do. Your problem is that a lot of QuarkXPress is still stuck in your brain. This chapter helps you make the mental switch so that you can become a native InDesigner.

Also, consider picking up a copy of *QuarkXPress to InDesign: Face to Face*, by Galen Gruman (Wiley Publishing, Inc.), which shows you side by side how to do in InDesign what you know how to do in QuarkXPress.

Opening Those Old QuarkXPress Files

InDesign opens QuarkXPress and QuarkXPress Passport files — but only in versions 3.3, 4.0, and 4.1. If InDesign sees any problems when opening these files, it gives you an alert so you know what to fix in the converted file. After the file opens, it is untitled, so you need to give it a new name.

Paying Attention to Selection Tool Differences

If you're a QuarkXPress veteran, the toughest thing about switching to InDesign is the set of tools. InDesign's Selection tool only lets you move and resize objects, and the Direct Selection tool lets you reshape objects and work with graphics. In InDesign, you use the Type tool to work with text, but you can't move or resize text frames while you're using it.

Using Keyboard Shortcuts for Tools

Because InDesign requires a lot more switching among tools than QuarkXPress, your mouse hand can tire very quickly. To avoid that, embrace InDesign's single-letter shortcuts for selecting tools.

Table 28-1 shows the shortcut translations for common activities.

Table 28-1	Keyboard Shortcuts Translated from QuarkXPress to InDesign	
<i>Action</i>	<i>QuarkXPress Shortcut</i>	<i>InDesign Equivalent</i>
Preferences	Option+Shift+⌘+Y or Ctrl+Alt+Shift+Y	⌘+K or Ctrl+K
Get Text/Picture	⌘+E or Ctrl+E	⌘+D or Ctrl+D for Place
Paragraph formats	⌘+Shift+F or Ctrl+Shift+F	Option+⌘+T or Ctrl+Alt+T
Character formats	⌘+Shift+D or Ctrl+Shift+D	⌘+T or Ctrl+T
Style Sheets palette	F11	⌘+F11 or Ctrl+F11 (Character Styles panel), Shift+⌘+F11 or Ctrl+Shift+F11 (Paragraph Styles panel)
Spelling (word)	⌘+L or Ctrl+W	⌘+I or Ctrl+I
Modify dialog box	⌘+M or Ctrl+M	No equivalent
Duplicate	⌘+D or Ctrl+D	Option+Shift+⌘+D or Ctrl+Alt+Shift+D
Step and Repeat	Option+⌘+D or Ctrl+Alt+D	Shift+⌘+V or Ctrl+Shift+V
Lock/Unlock	F6	⌘+L or Ctrl+L (lock), Option+⌘+L or Ctrl+Alt+L (unlock)
Ungroup	⌘+U or Ctrl+U	Shift+⌘+G or Ctrl+Shift+G
Send to Back	Shift+F5	Shift+⌘+[or Ctrl+Shift+[
Send Backward	Option+Shift+F5 or Ctrl+Shift+F5	⌘+[or Ctrl+[
Bring to Front	F5	Shift+⌘+] or Ctrl+Shift+]
Bring Forward	Option+F5 or Ctrl+F5	⌘+] or Ctrl+]

Thinking Panels, Not Dialog Boxes

Keep in mind that many InDesign menu commands simply display a panel (which may already be open) rather than showing a dialog box. Get used to deciphering icons or using Tool Tips on the panels because InDesign doesn't have as many dialog boxes containing named fields as you're used to in QuarkXPress. Also, InDesign implements contextual menus on a broader scale than QuarkXPress, so you can Control+click or right-click objects, rulers, and more to make changes quickly.

Using Familiar Measurements

InDesign uses all of the QuarkXPress measurement abbreviations, as well as its own. For example, InDesign accepts QuarkXPress's use of " to indicate inches, as well as InDesign's own standard of in and inch.

Knowing Differences in Documents

By and large, documents in InDesign and QuarkXPress are the same. You have master pages, layers, and pages. You can also set bleeds for objects that go beyond the page boundary. The biggest difference is that InDesign's master text frame lets you automatically flow text from page to page, whereas the QuarkXPress equivalent (an automatic text box) places an empty text box on each page for you to use as you see fit.

Working with Objects, Not Items

In QuarkXPress, you're used to distinct items such as text boxes, picture boxes, lines, and maybe text paths. In InDesign, you have more flexible objects such as paths and frames that can contain graphics or text.

Approaching Text from a New Perspective

In many cases, InDesign works with text very differently than QuarkXPress, even though the fundamental capabilities are the same in both programs. Veteran QuarkXPress users will be frustrated initially with InDesign's more-laborious approach to text flow and formatting, but will eventually appreciate some of InDesign's more powerful capabilities such as stroke formatting and nested styles.

Starting with the Direct Selection Tool for Graphics

Importing and manipulating graphics in InDesign is very similar to QuarkXPress. As long as you remember to use the Direct Selection tool to select a graphic rather than its frame, you and the InDesign graphics features will get along fine.

Paying Close Attention When Printing

InDesign and QuarkXPress offer many of the same output capabilities, such as print styles (called *print presets* in InDesign), PDF export, color calibration, and color separation support. But there are some notable differences beyond the different organization of their Print dialog boxes. For example, InDesign doesn't have any options to change image contrast or line-screen element for grayscale and black-and-white images, as QuarkXPress does. You need to apply such effects in an image editor.

Chapter 29

Top Ten Must-Knows for PageMaker Orphans

In This Chapter

- ▶ Transferring PageMaker files to InDesign
 - ▶ Comparing how the two programs work
-

You've finally thrown in the towel. After all, it's been eight years since the last release of PageMaker, and both Windows and Mac OS X have made PageMaker a real anachronism on your computer. So you're making the switch. Yet you have a lot of PageMaker still in your brain. This chapter helps you shift your mental gears so that you can become an InDesign user.

Fortunately, Adobe has retained a lot of PageMaker's approach in InDesign, so you can mainly focus on what's new rather than what's different. The basic methods for working with frames, lines, and pages are the same in both programs. What you get with InDesign is more control, with improved tools for drawing, formatting text, and manipulating objects.

Open Those Old PageMaker Files

InDesign opens PageMaker files saved in versions 6.0, 6.5, and 7.0. If InDesign sees any problems, it gives you an alert so you know what to fix in the converted file. After the file opens, it is untitled. You need to give the file a new name so that you don't accidentally overwrite that original PageMaker file.

You Now Have Three Selection Tools

The basic selection, object-creation, and navigation tools in InDesign are similar to those in PageMaker, but InDesign has *three* selection tools:

- ✓ Use the **Selection tool** to move or resize objects.
- ✓ Use the **Direct Selection tool** to reshape objects, change the end points of lines, and work with objects in groups. The Direct Selection tool also works like PageMaker's Crop tool, letting you move graphics within a frame.
- ✓ Use the **Position tool** to do what you were used to doing with PageMaker's Crop tool. It duplicates some of the Selection tool's functionality and some of the Direct Selection tool's functionality, so you might want to throw away this PageMaker crutch and just use the two native InDesign tools.

Switching Your Shortcuts

InDesign uses many different keyboard shortcuts than PageMaker did, so be aware of the differences. Table 29-1 highlights the main differences.

<i>PageMaker Shortcut</i>	<i>Result</i>	<i>InDesign Equivalent</i>
⌘+B or Ctrl+B	Styles pane	⌘+F11 or Ctrl+F11 (Character Styles panel), Shift+⌘+F11 or Ctrl+Shift+F11 (Paragraph Styles panel)
⌘+I or Ctrl+I	Indents/tabs dialog box	Shift+⌘+T or Ctrl+Shift+T
⌘+E or Ctrl+E	Edit in Story Editor	⌘+Y or Ctrl+Y
⌘+L	Spell-check	⌘+I or Ctrl+I
⌘+' (apostrophe) or Ctrl+' (apostrophe)	Control palette	Option+⌘+6 or Ctrl+Alt+6
⌘+J or Ctrl+J	Colors pane	F5 (Swatches panel)
⌘+8 or Ctrl+8	Layers pane	F7
Option+⌘+8 or Ctrl+Alt+8	Master Pages pane	⌘+F12 or Ctrl+F12 (Pages panel)

<i>PageMaker Shortcut</i>	<i>Result</i>	<i>InDesign Equivalent</i>
⌘+U or Ctrl+U	Fill and Stroke dialog box	⌘+F10 or Ctrl+F10 (Stroke panel)
Shift+⌘+E	Align dialog box	Shift+F7 (Align panel)
Option+⌘+E	Text Wrap dialog box	Option+⌘+W or Ctrl+Alt+W

Setting Aside Time to Set Preferences

You have so many preferences options in InDesign that you may wonder whether you'll ever leave the Preferences dialog box after you start setting them! Fortunately, you can set preferences at any time, so go ahead and start working with InDesign as it comes out of the box and then update preferences as specific needs arise.

Working with Objects, Not Elements

As with other aspects of InDesign, when you work with objects, you gain more than you lose. The types of objects (called *elements* in PageMaker) are similar — text frames, graphics frames, and lines — but InDesign offers more variations of them and more controls over their formatting.

Don't Worry Much about Text Differences

InDesign gives you more control over text formatting, such as the ability to stroke and fill characters in InDesign. Note that there are no type-style buttons — InDesign requires you to choose the appropriate version of a typeface rather than apply bold and italic to the general typeface. Other type styles are listed in the Character panel's flyout menu.

Don't Worry Much about Graphics, Either

InDesign and PageMaker are very much alike when it comes to importing and manipulating graphics. InDesign lets you click and drag graphics files into a layout in addition to using the Place command (choose File⇨Place or press ⌘+D or Ctrl+D), as well as create clipping paths and automatically scale graphics or frames for you.

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