VISUAL QUICKSTART GUIDE

SANDEE COHEN

InDesign

FOR MACINTOSH & WINDOWS

Teach yourself InDesign the quick and easy way! This Visual QuickStart Guide uses pictures rather than lengthy explanations. You'll be up and running in no time!

VISUAL QUICKSTART GUIDE

INDESIGN CS

FOR MACINTOSH AND WINDOWS

Sandee Cohen

Peachpit Press

Visual QuickStart Guide

InDesign CS for Macintosh and Windows

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DEDICATED TO

Terry DuPrât
Thank you for everything you have done
to make my life more rewarding and fun

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Pixel, my cat, who has gotten very blasé about these books and doesn't watch me work anymore.

And a very special thanks to **David Lerner** of **Tekserve,** who once again helped me get keep my computers running in the middle of the book crunch. Tekserve (www.tekserve.com) is the best place to buy, fix, or enhance Macintosh computers.

Colophon

This book was created using InDesign 2.0. The computers used were a Macintosh G4 450 Mhz, a G4 500 Mhz Powerbook, and a Gateway 200 XL. Screen shots were taken using Snapz Pro X (Macintosh) and Snaggit (Windows). Fonts used were Minion and Futura from Adobe, Circle Negative from Myfonts.com, and a specialty "tip" font I created using FontLab from FontLab Inc.

TABLE OF CONTENTS

	Introduction	xi
Chapter 1	**Getting Started**	1
	Choosing Palettes	2
	Working with Palettes	10
	Using Workspaces	14
	Using the Toolbox	15
	Using Contextual Menus	16
Chapter 2	**Document Setup**	17
	Starting Documents	18
	Choosing Layout Options	20
	Changing Layout Options	23
	Using the Document Presets	24
	Using Document Rulers	26
	Working with Guides	28
	Working With Document Grids	32
	Changing the Magnification	33
	View and Pasteboard Controls	35
	Using the Zoom and Hand Tools	37
	Using the Navigator Palette	39
	Controlling Windows	41
	File Maintenance	42
Chapter 3	**Basic Text**	45
	Creating Text Frames	46
	Typing Text	49
	Selecting Text	50
	Moving and Deleting Text	52
	Using the Character Palette	53
	Setting the Typeface and Point Size	54
	Styling Text	55
	Setting Line and Character Spacing	57
	Applying Text Distortions	59
	Setting the Language	60
	Applying Paragraph Formatting	61
	Setting Alignment and Indents	62
	Inserting a Manual Indent	64
	Setting Paragraph Effects	65
	Using the Text Utilities	66
	Working with Text Flow	68
	Setting Text Frame Controls	69

Using the Control Palette for Text 72
Using Special Text Characters 73
Windows Commands 74
Macintosh Commands 74

Chapter 4 **Working with Objects** 75

Types of Frames 76
Creating Basic Shapes 77
Selecting Objects 79
Moving Objects 80
Replicating Objects 82
Resizing Objects 84
Using the Transform Tools 85
Using the Transform Palette 90
Using the Transform Palette Menu 94
Using the Arrange Commands 95
Aligning Objects 96
Grouping and Pasting Into Objects 99
Using the Control Palette for Objects 103
Using the Measurement Tool 104
Using the Info Palette with Objects 106
Locking Objects 107
Selecting Frames 108

Chapter 5 **Working in Color** 109

The Basics of Color 110
Using the Color Palette 112
Defining and Storing Swatches 116
Using Swatch Libraries 124
Creating Mixed Inks 126
Creating Tints 130
Creating Gradient Swatches 132
Using the Eyedropper 135
Overprinting Colors 136

Chapter 6 **Styling Objects** 137

Applying Fills 138
Applying Stroke Effects 142
Creating Custom Stroke Styles 149
Adding Arrows and Corner Effects 156
Applying Transparency 157
Adding Drop Shadows and Feathers 161
Using the Pathfinder Commands 163
Using the Eyedropper 164
Setting Object Defaults 166

Chapter 7 **Pen and Bezier Tools** 167
Pen Points 168
Drawing Lines 169
Drawing Curves 170
Changing Curves and Corner Points 171
Modifying Paths 172
Modifying Points 174
Using the Pencil Tool 176
Using the Smooth Tool 178
Using the Erase Tool 179
Adding or Deleting Points on Paths 180

Chapter 8 **Imported Graphics** 181
Placing Artwork 182
Specialty Frames 184
Setting Image Import Options 187
Working with Images Inside Frames 189
Fitting Graphics in Frames 191
Nesting Graphic Elements 193
Inline Graphics 196
Styling Placed Images 198
Linking Graphics 199
Embedding Graphics 203
Using Clipping Paths 204
Importing Transparent Images 208
Viewing Images 210
Applying Effects to Images 213

Chapter 9 **Text Effects** 215
Wrapping Text 216
Text on a Path 221
Working with Paragraph Rules 224

Chapter 10 **Pages and Books** 229
Changing the Pages Palette 230
Adding Blank Pages 231
Navigating Pages 233
Creating and Separating Spreads 236
Importing Text 238
Flowing Text 240
Creating Text Breaks 244
Working with Master Pages 245
Adjusting Layouts 250
Working with Page Numbers 251
Making Books 253
Creating a Table of Contents 258

Creating an Index 263

Chapter 11 **Layers** 265

Creating and Deleting Layers 266
Setting the Layer Options 268
Working with Layers 271

Chapter 12 **Libraries** 273

Storing Items in a Library 274
Setting the Library Display 276
Searching and Sorting Libraries 277

Chapter 13 **Tabs and Tables** 279

Inserting Tab Characters 280
Setting Tab Stops 281
Creating Tab Leaders 284
Creating and Using Tables. 285
Navigating Through Tables 290
Selecting Tables 291
Working with Rows and Columns 293
Adjusting Tables Within a Text Frame 299
Working with Headers and Footers 300
Adding Images to Tables 302
Customizing Cells 303
Setting Borders. Strokes. and Fills 306
Alternating Strokes and Fills. 309
Adding Diagonal Lines in Cells 312
Using the Table or Control Palettes 313

Chapter 14 **Automating Text** 315

Changing Case 316
Checking Spelling 316
Finding and Changing Text 319
Find Dialog Box Settings 324
Using the Story Editor 326
Defining Styles 328
Paragraph Style Categories 329
Defining Styles (continued) 332
Applying Styles 337
Overriding Styles 338
Changing and Deleting Styles 339
Automatic Drop Cap Styling 342
Using Nested Styles 344
Using the Eyedropper on Text 348
Creating Tagged Text 350
Using Find Font 352

Keeping Lines Together 353
Using Scripts 354

Chapter 15 **Typography Controls** 357

Optical Margin Alignment 358
Using Adobe Paragraph Composer 359
Applying Justification Controls 360
Controlling Hyphenation 364
Baseline Grid 366
Balancing Ragged Lines 368
Using OpenType 368
OpenType Features 370

Chapter 16 **Color Management** 373

Choosing Color Settings 374
Working with Profiles 378

Chapter 17 **Interactive PDF Elements** 379

Types of Interactive Elements 380
Defining Hyperlinks 381
Working with Hyperlinks 390
Working with Bookmarks 391
Adding Sounds 394
Adding Movies 396
Movie Display Options 399
Creating Buttons 401
General Button Properties 403
Setting the Button States 404
Applying Behaviors 409
Button Behaviors 410
Applying Behaviors (continued) 412
Deleting or Deactivating Behaviors 413
Exporting Interactive PDFs 416

Chapter 18 **Output** 417

Printing a Document 418
Print Dialog Box Categories 419
Setting the General Print Options 421
Choosing the Setup Controls 422
Tiling Pages 423
Setting Marks and Bleed 425
Setting the Output Controls 427
Working with Separations Preview 429
Separation Preview Plate Settings 430
Color Separations and Ink Manager 432
Setting the Graphics Options 434
Setting the Advanced Options 435

Flattener Presets and Preview 436
Working with Print Presets 440
Creating a Print Summary 442
Creating Postscript Files 443
Creating a Preflight Report 444
Packaging a Document 447

Chapter 19 **Exporting** 449

Setting the Export File Options 450
Creating PDF Files 451
General PDF Options 453
Compression PDF Options 456
Advanced PDF Options 459
Security PDF Options 460
Working with PDF Presets 462
Creating EPS Files 464
InDesign Interchange Format 467
Setting JPEG Export Options 467
Exporting SVG Files 469
Exporting Text 472
Packaging for GoLive 473

Chapter 20 **Customizing InDesign** 477

Modifying Keyboard Shortcuts 478
Setting the Preference Categories 481
General Preferences 485
Text Preferences 488
Composition Preferences 490
Units & Increments Preferences 492
Grids Preferences 493
Guides & Pasteboard Preferences 494
Dictionary Preferences 495
Spelling Preferences 497
Display Performance Preferences 497
File Handling 499
Updates Preferences 500
Configuring Plug-ins 500

Appendix **Keyboard Shortcuts** 501

Macintosh Shortcuts 502
Windows Shortcuts 514

Index 527

INTRODUCTION

Welcome to the InDesign CS Visual *QuickStart* Guide, my fourth version of the book. It's hard to believe how quickly InDesign has become a major force in desktop publishing and page layout. I feel very lucky to have been working with and teaching InDesign since its very first version. In fact, this is the only third-party book that has had editions for all four versions of InDesign.

Rarely has an application caused as much excitement as InDesign. The first version, released in April 2000, was hailed for its innovative typographic features. Version 1.5, which came out in December of 2000, added more tools and text controls. With version 2, InDesign created great excitement by adding transparency effects, drop shadows, feather effects, and support for transparency in files imported from Photoshop and Illustrator.

Now, with InDesign CS, Adobe has added new automation features with nested styles. My favorite new features are the new underline and strikethrough controls, mixed inks, and custom strokes and dashes. I also am excited by the ability to add interactive buttons, sounds, and movies to InDesign files.

Using This Book

If you have used any of the other Visual QuickStart Guides, you will find this book to be similar. Each chapter is divided into different sections that deal with a specific topic—usually a tool or command. For instance, the chapter on text has sections on creating text frames, typing text, selecting text, and so on.

Each of the sections contains numbered exercises that show you how to perform a specific technique. As you work through the steps, you gain an understanding of the technique or feature. The illustrations help you judge if you are following the steps correctly.

I've also sprinkled sidebars, printed in gray boxes, throughout the chapters. Some of these sidebars give you a bit of history or background for a specific feature. Other times, I've written out humorous stories about desktop publishing. These sidebars are the same as the little stories and anecdotes I tell my students in the classes I teach.

Instructions

You will find it easier to use this book once you understand the terms I am using. This is especially important since some other computer books use terms differently. Therefore, here are the terms I use in the book and explanations of what they mean.

Click refers to pressing down and releasing the mouse button on the Macintosh, or the left mouse button on Windows. You must release the mouse button or it is not a click.

Press means to hold down the mouse button, or a keyboard key.

Press and drag means to hold the mouse button down and then move the mouse. I also use the shorthand term ***drag.*** Just remember that you have to press and hold as you drag the mouse.

Menu Commands

InDesign has menu commands that you follow to open dialog boxes, change artwork, and initiate certain actions. These menu commands are listed in bold type. The typical direction to choose a menu command might be written as **Object** > Arrange > Bring to Front. This means that you should first choose the Object menu, then choose the Arrange submenu, and then choose the Bring to Front command.

Keyboard Shortcuts

Most of the menu commands for InDesign have keyboard shortcuts that help you work faster. For instance, instead of choosing New from the File menu, it is faster and easier to use the keyboard shortcut (Cmd-N on the Macintosh and Ctrl-N on Windows). Often these shortcuts use multiple keystroke combinations.

The modifier keys used in keyboard shortcuts are sometimes listed in different orders by different software companies or authors. The order that you press those modifier keys is not important. However, it is very important that you always add the last key (the letter or number key) after you press the other keys.

Learning Keyboard Shortcuts

While keyboard shortcuts help you work faster, you really do not have to start using them right away. In fact, you will most likely learn more about InDesign by using the menus. As you look for one command, you may see another feature that you would like to explore.

Once you feel comfortable working with InDesign, you can start adding keyboard shortcuts to your repertoire. My suggestion is to look at which menu commands you use most often. Then each day choose to use one of those shortcuts. For instance, if you import a lot of art from other programs, you might decide to learn the shortcut for the Place command (Cmd-D on the Mac; Ctrl-D on Windows). For the rest of that day use the shortcut every time you import text or art. Even if you have to look at the menu to refresh your memory, use the keyboard shortcut to actually open the Place dialog box. By the end of the day you will have memorized the Place shortcut. The next day you can learn a new one.

Cross-Platform Issues

One of the great strengths of InDesign is that it is almost identical on both the Macintosh and Windows platforms. In fact, at first glance it is hard to tell which platform you are working on. However, because there are some differences between the platforms, there are some things you should keep in mind.

Modifier Keys

Modifier keys are always listed with the Macintosh key first and then the Windows key second. So the instruction "Hold the Cmd/Ctrl key" means hold the Cmd key on the Macintosh platform or the Ctrl key on the Windows platform. When the key is the same on both computers, such as the Shift key, only one key is listed.

Generally the Cmd key on the Macintosh (sometimes called the Apple key) corresponds to the Ctrl key on Windows. The Opt key on the Macintosh corresponds to the Alt key on Windows. The Control key on the Macintosh does not have an equivalent on Windows. Notice that the Control key for the Macintosh is always spelled out while the Ctrl key for Windows is not.

Platform-Specific Features

A few times in the book, I have written separate exercises or instructions for the Macintosh and Windows platforms. These exercises are indicated by (Mac) and (Win).

Most of the time this is because the procedures are so different that they need to be written separately. Some features exist only on one platform. Those features are then labeled as to their platform.

Whether you're learning InDesign in a class or on your own, I hope this book helps you master the program. Just don't forget to have fun!

Sandee Cohen

(Sandee@vectorbabe.com)
December, 2003

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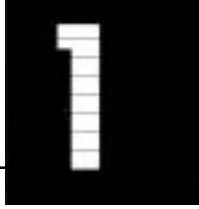
GETTING STARTED



One of the reasons why InDesign has become so popular is that it uses many of the same tools, palettes, and onscreen elements that are found in Adobe Photoshop and Adobe Illustrator. So you may be tempted to skip this chapter that covers those onscreen elements.

However, despite the fact that InDesign comes from Adobe, it has some features that you won't find in those other Adobe applications.

So, although you may think you know everything in this chapter, take a quick look at these pages. You may discover some things you didn't realize were in InDesign.

Of course, if this is your first introduction to an Adobe product, you'll want to read this chapter very carefully as you will learn some techniques you can use for either Illustrator or Photoshop.

Choosing Palettes

Most of the commands and features that control InDesign are found in the onscreen palettes. Each of the palettes covers special features. The palettes are similar to those found in other Adobe applications. Although they first appear how Adobe arranges them, we'll look at them in alphabetical order.

Align palette

The Align palette ❶ (Window>Align) aligns and distributes objects on a page *(see Chapter 4, "Working with Objects").*

❶ *Use the Align* palette *to align the edges and centers of objects or to distribute the space between objects.*

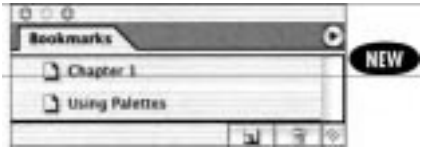
Attributes palette

The Attributes palette ❷ (Window>Attributes) allows you to set fills and strokes to overprint *(see Chapter 5, "Working in Color").* It also lets you create non-printing objects *(see Chapter 18, "Output").*

❷ *The* Attributes palette *lets you set the overprinting controls for fills and strokes or set objects to notprint.*

Bookmarks palette

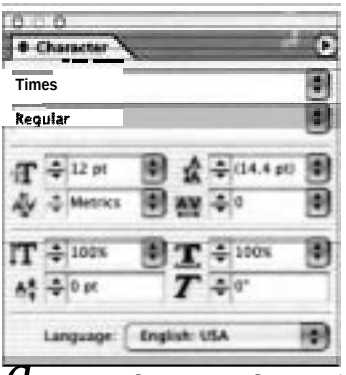
The Bookmarks palette ❸ (Window>Bookmarks) allows you to define pages as bookmarks. These bookmarks are then used as navigation aids in PDF documents *(see Chapter 17, "Interactive PDF Elements").*



❸ *The* Bookmarks palette *lets you create navigation bookmarks that are used in Adobe PDF documents.*

Character palette

The Character palette ❹ (Window>Type>Character or Type>Character) controls character-level attributes such as the typeface and point size *(see Chapter 3, "Basic Text").*



❹ *Use the* Character palette *to format the appearance of text characters.*

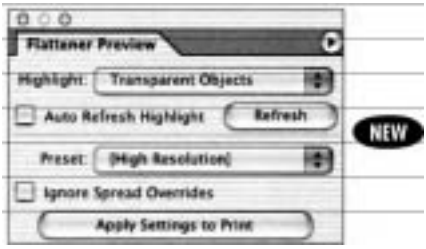
What's New in InDesign CS?

As you read this chapter, you'll notice the word NEW next to some palettes. These are the palettes that have never been in InDesign CS before this. That's not to say that the other palettes don't have any new features. It's just that the new palettes didn't exist in previous versions of the program.

❺ *Use the* Character Styles palette *to automate the formatting of text characters.*

❻ *The* Color palette *is used to mix colors to apply to text and objects.*

❼ *The* Control palette *changes its options depending on the selected object.*



❽ *The* Flattener Preview palette *is used to see how the transparency effects will affect objects and images.*

❾ *The* Glyphs palette *lets you insert characters from a font.*

Character Styles palette

The Character Styles palette ❺ (Window> Type >Character Styles or Type >Character Styles) lets you define and work with character styles *(see Chapter 14, "Automating Text").*

Color palette

The Color palette ❻ (Window >Color) allows you to mix or apply colors *(see Chapter* **5,** *"Working in Color").*

Control palette

The Control palette ❼ (Window> Control) changes its layout depending on the object selected on the page. If you are working with text, the Control palette shows a combination of the Transform, Paragraph, or Character palettes. If you are working with objects, the palette shows a combination of the Transform and Stroke palettes. The Control palette is covered in chapters 3, 4, and 13.

Flattener Preview palette

The Flattener Preview palette ❽ (Window >Output Preview >Flattener) lets you display the page as it would look after flattening has been applied during the printing process *(see Chapter 18, "Output").*

Glyphs palette

The Glyphs palette ❾ (Window> Type ▸ Insert Glyphs or Type >Insert Glyphs) lets you insert or replace characters from a font *(see Chapter* 3, *"Basic Text").* The Glyphs palette also helps you work with OpenType features *(see Chapter* 15, *"Typography Controls").*

Gradient palette

The Gradient palette ⑩ (Window>Gradient) lets you define and control the appearance of gradients or color blends *(see Chapter 5, "Working in Color").*

Hyperlinks palette

The Hyperlinks palette ⑪ (Window>Interactive>Hyperlinks) is used to create links that let you easily navigate around PDF and HTML documents *(see Chapter 17, "Interactive PDF Elements").*

Index palette

The Index palette ⑫ (Window>Type & Tables>Index) lets you create cross-referenced index entries for a document or book *(see Chapter 10, "Pages and Books").*

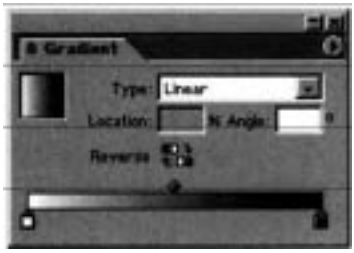
Info palette

The Info palette ⑬ (Window>Info) gives you feedback on the type of object selected, and the action taken on that object *(see Chapter 4, "Working with Objects,").*

Even More Palettes?

Your copy of InDesign may display even more palettes. These may be part of third-party plug-ins that give you features not found in the basic InDesign program.

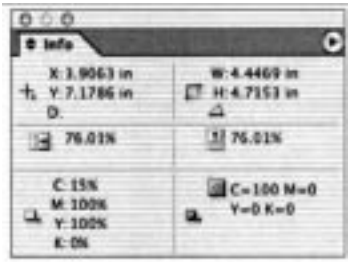
Third-party palettes are not available in the ordinary installation. You need to install the plug-ins for those features. *(See Chapter 20, "Customizing InDesign" for information on installingplug-ins.)*



⑩ *The* Gradient palette *lets you create color blends.*

⑪ *Use the* Hyperlinks palette *to create and store links to otherpages in a PDF document or on the Web.*

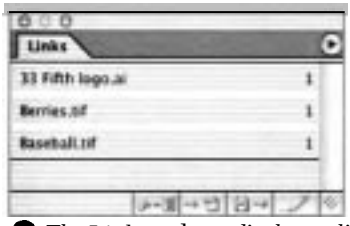
⑫ *The* Index palette *lets you create and manage index entries for a document or book.*



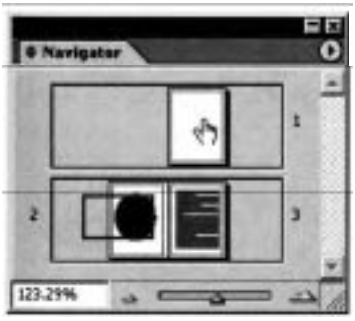
⑬ *The* Info palette *shows the attributes of objects. These attributes change depending on the object chosen.*

⓮ *Use the* Layers palette *to add layers and change their display.*

⓯ *Create a* Library palette *to store commonly used items and add them to documents.*



⓰ *The* Links palette *displays a list of all the imported graphics and text files.*



⓱ *Use the* Navigator palette *to see a preview of your document and move around the pages.*

Layers palette

The Layers palette ⓮ (Window>Layers) controls the stacking order and visibility of different layers *(see Chapter 11, "Layers").*

Library palette

The Library palette ⓯ (File>**New**>Library) lets you store and re-use elements *(see Chapter 12, "Libraries").*

Links palette

The Links palette ⓰ (Window>Links) controls the status of placed images *(see Chapter 8, "Imported Graphics").*

Navigator palette

The Navigator palette ⓱ (Window>Navigator) lets you see the layout of pages *(see Chapter 2, "Document Setup").*

Screen Real Estate

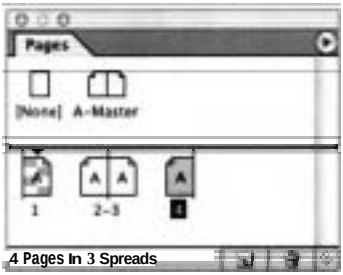
Your workspace may feel cramped with so many palettes on your screen. One way I've solved the problem was to invest in a small, second monitor.

That way I can set up InDesign so that the palettes are displayed in the second monitor while the Toolbox and the document window are displayed on your main monitor.

This gives you much more room to work on your document.

Pages palette

The Pages palette ⓲ (Window>Pages) lets you add and control pages and master pages as well as move from one page to another *(see Chapter 10, "Pages and Books").*



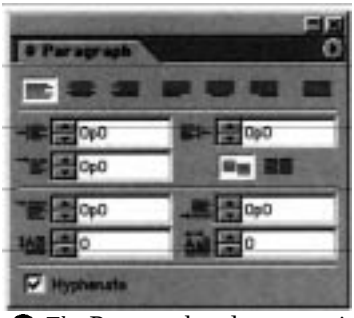
⓲ *The* Pages palette *lets you add and delete pages, apply master pages, and move through the document.*

Paragraph palette

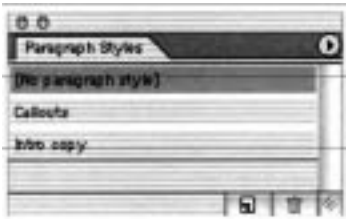
The Paragraph palette ⓳ (Window>Type>Paragraph) controls paragraph-level attributes such as the alignment and margin indents *(see Chapter 3, "Basic Text").*

Paragraph Styles palette

The Paragraph Styles palette ⓴ (Window>Type>Paragraph Styles) lets you define and apply paragraph styles *(see Chapter 14, "Automating Text").*



⓳ *The* Paragraph palette *contains all the formatting controls for textparagraphs.*

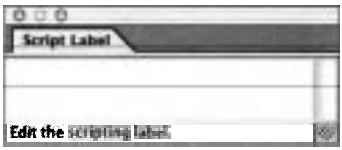


⓴ *The* Paragraph Styles palette *makes it easy to apply complex paragraph formatting to paragraphs.*

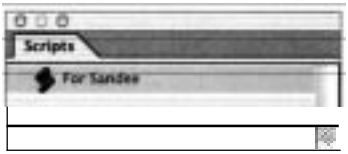
Pathfinder palette

The Pathfinder palette ㉑ (Window>Pathfinder) allows you to apply the Pathfinder commands that change the shapes of objects *(see Chapter 4, "Working with Objects").*

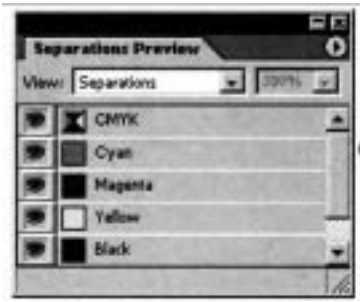
㉑ *The* Pathfinder palette *allows you to easily change the shape of objects.*



㉒ *The* Script Label palette *allows you to edit the labels applied to objects in a script.*

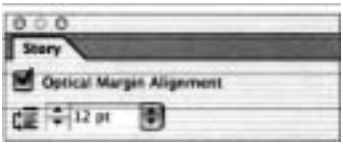


㉓ *The* Scripts palette *allows you to run scripts directly within* ***InDesign.***



NEW

㉔ *The* Separations Preview palette *lets you see the color plates that are in a document.*



㉕ *Use the* Story palette *to apply the optical margin alignment for hangingpunctuation.*

㉖ *The* Stroke palette *controls the appearance of rules and lines around objects.*

Script label palette

The Script Label palette ㉒ (Window>Scripting>Script Label) lets you edit labels that are applied to objects as part of scripts.

Scripts palette

The Scripts palette ㉓ (Window>Scripting>Scripts) displays the scripts that have been placed inside the Scripts folder. These scripts can be run directly from within InDesign *(see Chapter* 14, *"Automating Text").*

Separations Preview palette

The Separations Preview palette ㉔ (Window>Output>Separations) lets you change the display for the color plates in the document. This lets you see the individual color separations *(see Chapter* 18, *"Output").*

Story palette

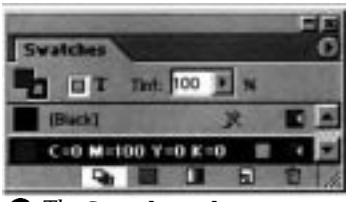
The Story palette ㉕ (Window>**Type**>Story) lets you change the automatic margin alignment to an optical margin alignment that adjusts the position of punctuation and serifs *(see Chapter* 14, *"Automating Text").*

Stroke palette

The Stroke palette ㉖ (Window>Stroke) controls attributes such as stroke width, dashes, and end arrows and symbols *(see Chapter* 6, *"Styling Objects").*

Swatches palette

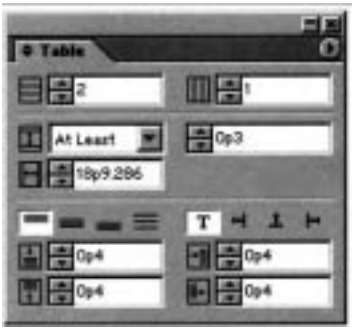
The Swatches palette ㉗ (Window > Swatches) stores the colors and gradients used in a document *(see Chapter 5, "Working in Color").*



㉗ *The* **Swatches palette** *stores colors and gradients.*

Table palette

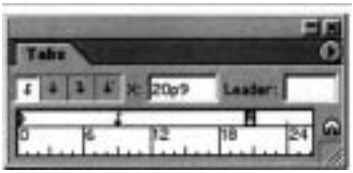
The Table palette ㉘ (Window>Type & Table>Table) contains the formatting and controls for creating tables within text frames *(see Chapter 13, "Tabs and Tables").*



㉘ *Use the* **Table palette** *to format tables and table cells.*

Tabs palette

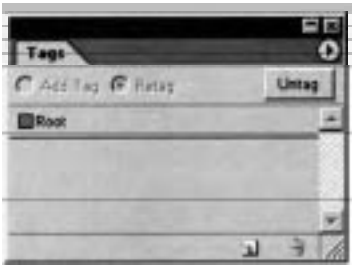
The Tabs palette ㉙ (Window>Type & Tables>Tabs or Type>Tabs) controls the position of the tab stops for text *(see Chapter 13, "Tabs and Tables").*



㉙ *The* **Tabs palette** *lets* **you** *position and format tabs within text.*

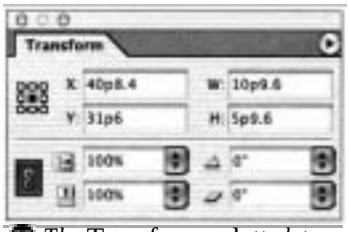
Tags palette

The Tabs palette ㉚ (Window>Tags) lets you apply and control XML (extensible markup language) tags in a document. Working with tags is beyond the scope of this book. For more information on using XML tags, see *Real World InDesign CS* by Olav Martin Kvern and David Blatner, published by Peachpit Press in association with Adobe Press.



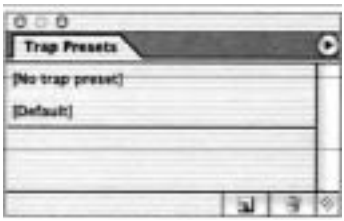
㉚ *Use the* **Tags palette** *to control XML tags in a document.*

31 *Use the* **Text Wrap palette** *to control how text wraps around objects and images.*



32 *The* Transform palette *lets you control the position and size-of objects. .*

33 *Use the* Transparency palette *to change the opacity and appearance of objects.*



34 *The* Trap Presets palette *lets you store trapping settings to apply to various objects.*

Text Wrap palette

The Text Wrap palette 31 (Window>Text Wrap) controls how text wraps around objects and placed images *(see Chapter 9, "Text Effects").*

Transform palette

The Transform palette 32 (Window> Transform) lets you see the size and position of objects. You can also use the Transform palette to apply transformations such as scaling and rotation *(see Chapter 4, "Working with Objects").*

Transparency palette

The Transparency palette 33 (Window> Transparency) contains the controls for opacity and blend modes *(see Chapter 6, "Styling Objects").*

Trap Presets palette

The Trap Presets palette 34 (Window>Trap Presets) is used to store different settings for how colors are trapped between one object and another *(see Chapter 18, "Output").*

Working with Palettes

If you don't see a palette onscreen, you can open it by choosing the command in the Window menu.

To open a palette:

- Choose the name of the palette from the Window menu.

TIP Palettes that control type, such as Character and Paragraph, are also listed in the Type menu

To close a palette:

- Click the close box in the title bar (45).

If you can't afford a second monitor, you can quickly hide your palettes and Toolbox.

To hide palettes

1. Make sure an insertion point is not within a text frame to avoid inserting a tab character into your text.
2. Press Shift+Tab key. This hides all the palettes.

   or

   Press the Tab key. This hides **all** the palettes including the Toolbox.

TIP Press the commands again or choose the palette command from the Window menu to reveal the palettes.

In addition to the palette buttons and fields, each palette contains a menu.

To display the palette menus:

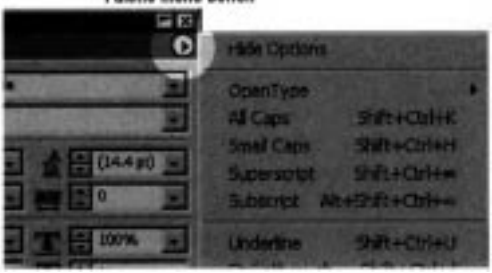
1. Click the palette menu button to open the palette menu (46).
2. Choose a command from the menu.

Mac close box

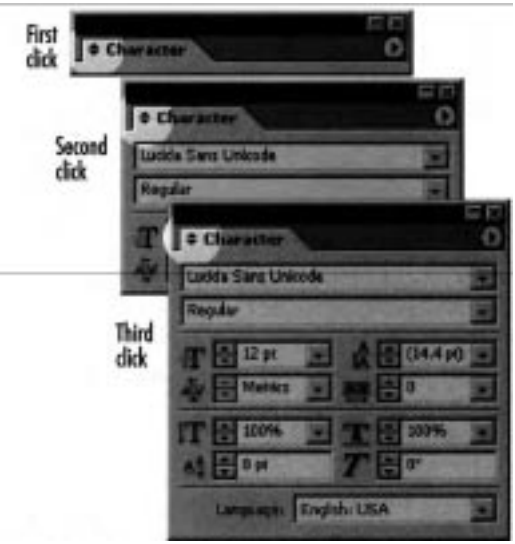
Window close box

(45) *Click the* close box *to close a palette.*

Palette menu button



(46) *Click the* palette menu button *to display the menu for a palette.*



37 *Each click on the palette options arrow changes the display of a palette.*

Some palettes display only some of their features when first opened. These palette contain up/down arrows next to the name of the palette. You can access the optional features by clicking the up/down arrows in the palette tab.

To reveal the palette options:

1. Click the up/down arrow in the palette tab to expand the palette to reveal the options for the palette 37.
2. Continue to click the arrow to toggle through each of the palette display states.

TIP The palette menu also contains a Show Options command that toggles between the palette display states.

Mac zoom button

Windows **collapse** box

38 *Click the* **collapse box** *to shorten the display of a palette.*

You can also shrink a palette so that it only displays the palette tab.

To shrink a palette display:

- Click the collapse box (Win) or zoom button (Mac) to collapse the palette.

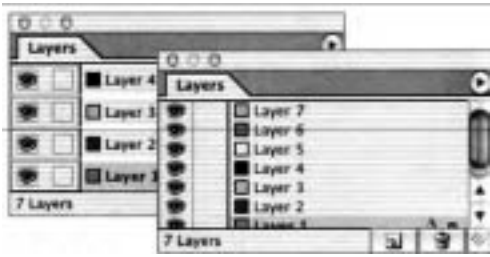
To expand a palette display:

- If the palette is collapsed, click the collapse box to expand the palette.

Some of the palettes allow you to display smaller palette rows, which helps you save screen space.

To display small palette rows:

- Choose Small Palette Rows from the palette menu to display the smaller text and symbols (39) for that palette.

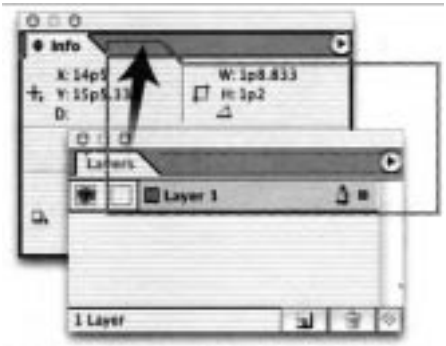


(39) **Small palette** rows *(lower window) display more information in the same size palette.*

Another way to save screen space is to move one palette so that it is located within the boundaries of another. This is called ***nesting.***

To nest palettes:

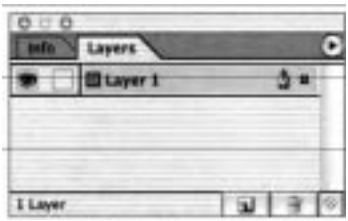
1. Position the cursor over the palette tab.
2. Drag the tab so that the outline is inside another palette. A black rectangle around the inside perimeter of the palette indicates that the two palettes will be nested (40).
3. Release the mouse button. The palette appears next to the other item (41).



(40) *Drag the palette tab into anotherpalette area to* **nest palettes.**

To unnest palettes:

1. Drag the palette tab so that the outline is completely outside the other palette.
2. Release the mouse button. The palette appears as a separate onscreen item.

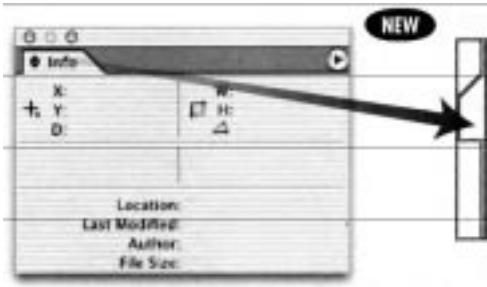


(41) *The results of nesting one palette into another.*

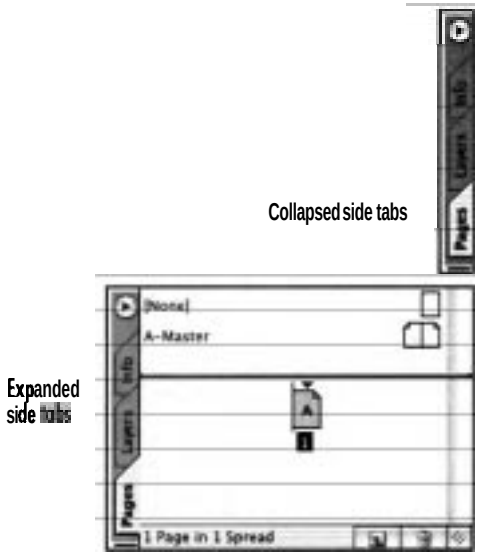
Another way to arrange palettes is to create side tabs that adhere to the sides of your screen.

To create a side tab:

1. Drag the palette tab to the left or right side of the screen. A vertical outline of the tab appears at the edge of the screen (42).
2. Release the mouse. This adheres the palette to the side of the screen.

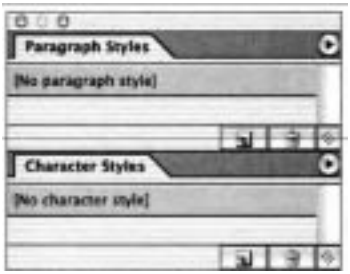


(42) *Drag the palette tab to the left or right side of the screen to create a* side tab.



43 *Click the side tab on its name to* expand or collapse the palette *to the side of the monitor.*

44 *Drag the palette tab to the bottom edge of another palette to* dock the palettes *together.*



45 *Dockedpalettes are displayed together.*

To collapse and expand side tabs:

- If the side tab is in its collapsed state, click on the side tab palette name to expand it from the side of the screen 43.

  If the side tab is in its expanded state, click on the side tab palette name to collapse it to the side of the screen 43.

TIP Side tabs can also be nested with other palettes.

You can also dock palettes so they open, close and move together. The palettes take up less space than if they were separated, yet unlike nested palettes, both can be seen at once.

To dock a palette:

1. Drag one palette tab to the bottom edge of another palette 44. A dark line appears at the bottom of the palette area.
2. Release the mouse. This docks the palette underneath the top palette 45.

To undock palettes:

1. Drag one palette tab so that the outline is completely outside the other palette.
2. Release the mouse button. The palette appears as a separate palette.

Using Workspates

I don't know any two InDesign users who agree as to how to arrange their palettes. Although my palettes may start out neatly arranged, within a short time I've got them scattered all over my screen—especially if I am demonstrating in front of a class.

Fortunately, you can arrange and save your palette arrangements into workspaces that you can call up at any time.

TIP InDesign ships with a workspace labeled Default. This is the workspace that the palettes revert to if you delete the InDesign preferences.

To save a custom workspace:

1. Arrange your palettes as you want them to appear on the screen.
2. Choose Workspace >Save Workspace. The Save Workspace dialog box appears 46.
3. Enter a name for the workspace.
4. Click the Save button. The name of the workspace appears in the Workspace menu.

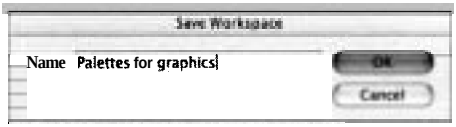
To apply a workspace:

- Choose the custom workspace from the Workspace menu.

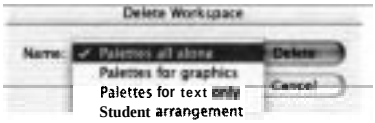
To delete a workspace:

1. Choose Workspace >Delete. The Delete Workspace dialog box appears 47.
2. Use the pop-up menu to choose the workspace you want to delete.
3. Click the Delete button to delete the workspace.

TIP You cannot delete the Default workspace.



46 *The* **Save Workspace dialog box** *lets you name the custom workspace configuration.*



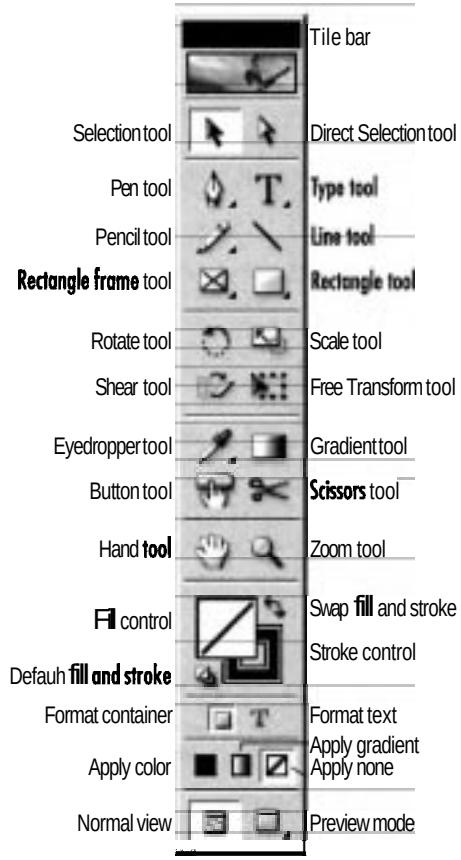
47 *The* **Delete Workspace dialog box** *lets you choose the workspace you want to delete.*

Suggestions for Using Workspaces

Workspaces save all the attributes, appearances, and positions of the palettes. This means that you can have a workspaace that closes all the palettes except one or two that you want to use.

You can have workspaces that show just the palettes that apply colors, gradients, and other object attributes. You can have other workspaces that show only the palettes that you use for text. You can even have a workspace that puts all the palettes on the left for left-handed users.

You can apply workspaces at any time as you are working—even with a document open. It's very soothing to see all your palettes rearrange into orderly groups.



The Toolbox *at its default tool display*

Using the Toolbox

The Toolbox contains the tools for working in InDesign as well as controls for applying the colors of fills and strokes. Some of the tools have fly-out panels that let you access the other tools in the category. ***(See the exercise on the next page for how to access the fly-out panels.)***

To choose a tool:

- Click the tool in the Toolbox.

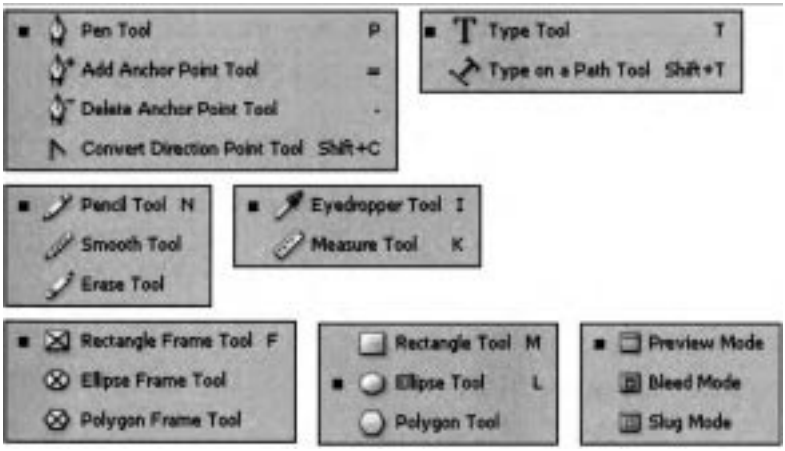
  or

  Tap the individual keyboard shortcuts for each of the tools. ***(See the Appendix for a list of all the default keyboard commands.)***

TIP You can change the arrangement of the Toolbox using the preferences ***(see page*** 486).

or

Double-click the title bar on the Toolbox to change arrangement.

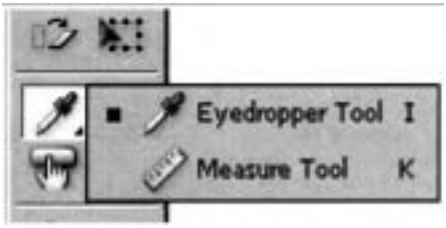


The Fly-out panels *in the Toolbox.*

Tools that have a small triangle in their box have other tools hidden in a fly-out panel.

To open the related tools:

1. Press the fly-out triangle on the tool slot. The fly-out panel appears (50).
2. Choose one of the tools listed in the fly-out panel.



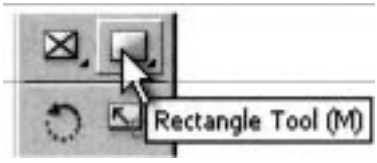
(50) *The* **fly-out panel** *displays the additional tools for that slot in the Toolbox.*

To see the tool keyboard shortcuts:

- Move the cursor over the tool and pause. A tool tip appears with the name of the tool and the keyboard shortcut (51).

TIP If you don't see the tool tip after pausing for a moment, make sure the Tool Tips control is turned on in the application preferences *(see Chapter* 20, *"Customizing InDesign").*

TIP You can change or add keyboard shortcuts for tools using the keyboard shortcut controls *(see Chapter* 20, *"Customizing InDesign").*



(51) *Pause over a tool to see the* **tool tip** *containing the tool name and keyboard shortcut.*

Using Contextual Menus

Contextual menus are menus that change depending on the type of object selected or where the mouse is positioned (52). The benefit of contextual menus is that you don't have to move all the way up to the menu bar to invoke a command. Also the menu changes to provide you commands that are appropriate for the type of object chosen.

To display contextual menus:

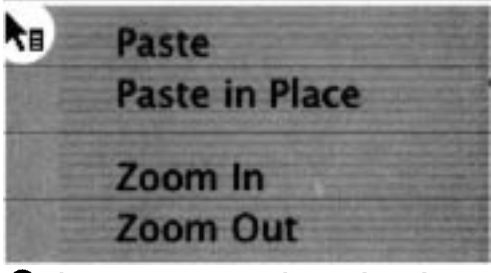
- (Mac) Hold the Control key and click the mouse button.

  or

  (Win) Click the right mouse button.

TIP The contextual menu cursor appears as you hold the Control key.

Contextual cursor



(52) *The* **contextual menu** *changes depending on what type of object is selected.*

DOCUMENT SETUP 2

Billions of years ago, when dinosaurs ruled the earth—or nineteen years ago, before the start of desktop publishing—people prepared documents for printing using pieces of stiff board. They marked up the boards with special blue pencils to indicate the edges of the pages. They drew marks that specified where the margins and columns should be and how the pages should be trimmed. This board, called a ***mechanical,*** was used as the layout for the document.

Unlike the board mechanicals of the past, InDesign documents are electronic layouts. Just as with the board mechanicals, you need to set the page sizes, margins, and column widths. However, since you are not using a pencil but a computer, you have additional controls for how the document is laid out.

Of course, changing an electronic layout takes far less time than it did with the board mechanicals that old dinosaurs like me used to use.

Starting Documents

When you create a new document, you have the opportunity to set many options in the New Document dialog box.

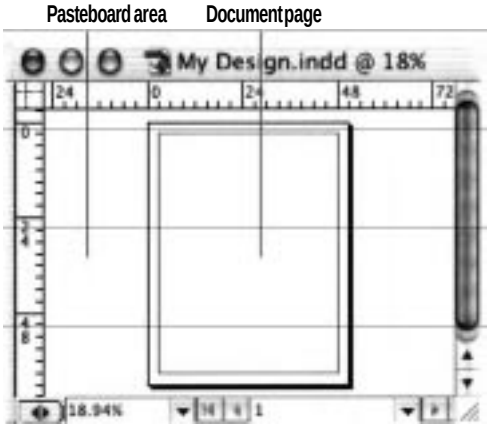
To set the basic options for a new document:

1. Choose **File > New** >Document. This opens the New Document dialog box ❶.
2. Type the number of pages in your document in the Number of Pages field.
3. Check Facing Pages to set your document with left-hand and right-hand pages. *(Seepage 20 for more information on facing pages.)*
4. Check Master Text Frame to make it easy to flow text onto pages. *(See page 245 for more information on master text frames.)*
5. Use the Page Size pop-up list to set the size of your page. *(See page 20 for more information on the page size.)*
6. Set the Orientation to portrait or landscape. *(Seepage 21 for more information on the page orientation.)*
7. Enter the size of the margins in the Margins fields. *(Seepage 21 for more information on setting the margins.)*
8. Set the number of columns and the gutter width in the Columns Number and Gutter fields. *(Seepage 22 for more information on columns and gutters.)*
9. Click OK. The document appears in the window ❷.

TIP See the section "Working with Document Presets" on page 24 for information about the Document Presets and Save Preset button.

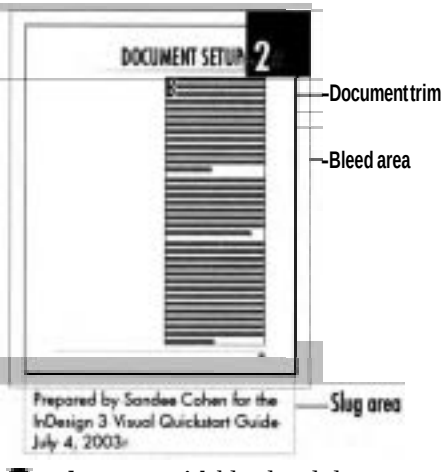
TIP The pages are surrounded by an area called the pasteboard. Like a drawing table, you can set items there for later use. Items on the pasteboard do not print.

❶ *The* **New Document dialog box** *set for the basic layout options.*



❷ *Each documentpage is surrounded by the* **pasteboard area** *where you can temporarily store objects for use later.*

❸ ***The*** New Document dialog box ***set for the advanced layout options.***



❹ ***A document with*** bleed and slug areas.

You can also set the advanced options for a document. The first is the area around the page, called a ***bleed.*** When you set a bleed, you define an area outside the trim of the page where objects will still print. The second area is called a ***slug.*** This is an area, well outside the page and bleed, where you can put information about the type of document. Slugs are often used by advertising agencies to list insertion dates and the name of the product, manufacturer, and ad agency,

To set the advanced options for a new document:

1. Click the More Options button in the New Document dialog box. The advanced options for Bleed and Slug dimensions appear at the bottom of the dialog box ❸.
2. Set the amounts for the size of the bleed area around the document ❹. ***(See the sidebar on page 426 for a description of why you need to set a bleed area.)***
3. Set the amounts for the size of the slug area around the document. The slug area is displayed outside the document trim ❹.

TIP Click the Make Same Size icon ***(seepage 21)*** for the Bleed or Slug to automatically set all the dimensions to the same size.

Choosing Layout Options

The term ***facingpages*** refers to documents such as this book where pages on one side of its spine face the pages on the other side. (This is also called a ***spread.)*** Single pages, such as advertisements,are set with facing pages turned off.

To set facing pages:

- With the Document Setup dialog box open, click Facing Pages. This changes the document from single page to facing pages ❹ and ❻.

TIP When a document is set for facing pages, the names in the dialog box for the left and right margins change to inside and outside margins ❻.

The page size is the size of the individual pages of the document.

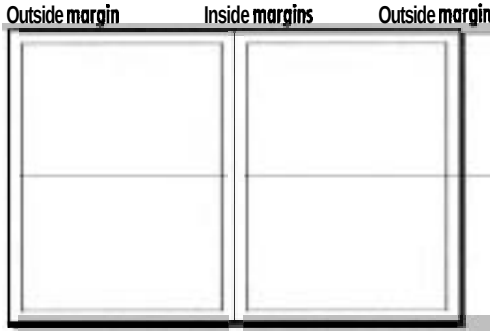
To set the size of the page:

- Choose one of the following 11 choices from the Page Size menu ❼:
  - Letter, 8½ by 11 inches.
  - Legal, 8½ by 14 inches.
  - Tabloid, 11 by 17 inches.
  - Letter–Half, 8½ by 5½ inches.
  - Legal–Half, 8½ by 7 inches.
  - **A4**, 21 by 29.7 centimeters.
  - **A3**, 29.7 by 42 centimeters.
  - **A5**, 14.8 by 21 centimeters.
  - **B5**, 17.6 by 25 centimeters.
  - **Compact** Disc, 4.7222 by 4.75 inches.
  - Custom, which allows you to enter your own specific values.

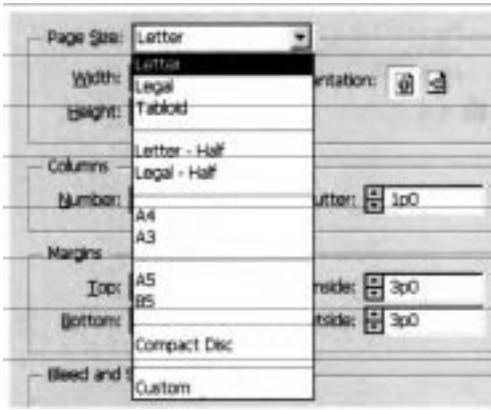
TIP The A4, A3, A5, and B5 sizes are used primarily outside of the United States.

TIP If you change the values in the Width or the Height fields, the Page Size automatically switches to the Custom setting.

❺ ***The left and right margins on*** nonfacing pages.

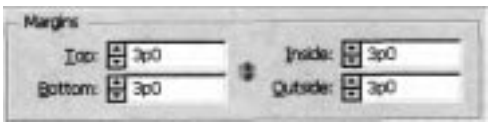


❻ ***The outside and inside margins on*** facing pages.

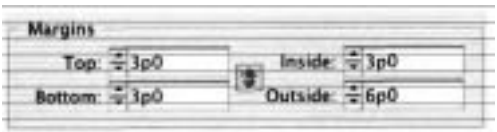


❼ ***The*** Page Size menu ***offers standard U.S. and international paper sizes, as well as customization controls.***

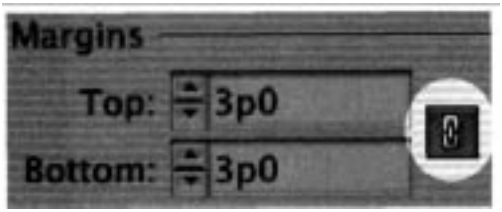
❽ *The* **Orientation choices** *let you set the position of the page.*



❾ *The margin settings for a document with facing pages.*



❿ *The margin settings for a document with non-facingpages.*



⓫ *Click the* **Make Same Size icon** *to automatically enter the same amount for all four margins.*

The term ***orientation*** refers to how the page is positioned, either up and down or sideways.

To set the orientation:

- Click the Portrait orientation to create a document where the width is always less than the height ❽.

  or

  Click the Landscape orientation to create a document where the width is always greater than the height ❽.

To set the margins:

1. Click the field arrows or enter an amount for the Top and Bottom fields.
2. If the document is set for facing pages, click the field arrows or enter an amount for the Inside and Outside fields ❾.

   or

   If the document is not set for facing pages, click the field arrows or enter an amount for the Left and Right margins ❿.

TIP For a facing page document, you can set the outside margin to be twice the size of the inside margin. That way the two inside margins combine around the gutter to be the same size as the outside margin.

TIP When you finish typing in one of the fields, press the Tab key to jump to the next field.

TIP Click the Make Same Size icon in the Margins area to control how the margins are created ⓫. When the icon displays a link, all the margins will be the same size. When the icon displays a broken link, you can enter different sizes for each margin.

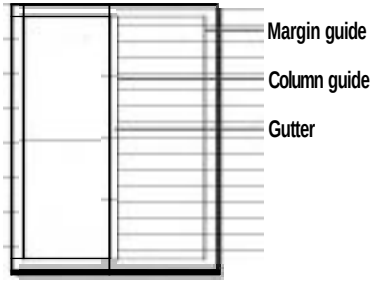
You can also set visible guides for columns and the ***gutters*** (or spaces) between the columns.

To set the columns and gutters:

1. Click the field arrows or enter an amount for the number of columns ⓬.
2. Click the field arrows or enter an amount for the gutter ⓬.

TIP The columns and gutters act as guidelines on your page ⓭. You can still place text or graphics across or outside the columns or gutters.

⓬ ***The*** column settings ***let you set the number of columns and the amount of space for the gutter between the columns.***



⓭ ***A*** two-column document ***with margin, column, and gutter guidelines.***

Wouldn't it be nice if the New Document dialog box remembered your favorite setup so you wouldn't have to change the settings each time you start a new document? It can, and that's called setting the ***defaults.***

To set the document defaults:

1. Close all InDesign documents, leaving just the application open.
2. Choose File >Document Setup. The Document Setup dialog box appears.
3. Make whatever changes you want to the options in the Document Setup dialog box.
4. Click OK. The settings you have chosen become the default for any new documents.

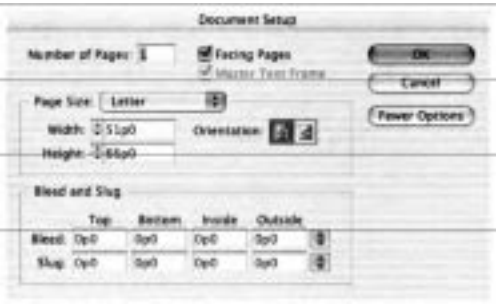
TIP You can also specify a Document Preset *(**seepage** 24)* to use as the document default.

Setting Other Defaults

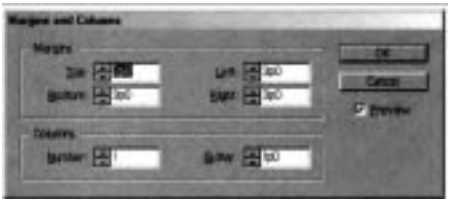
As you work in InDesign, you will discover other areas where you would like to set defaults. Perhaps you would like certain colors to appear (or not appear) in each new document. Or you would like certain text options to appear automatically.

Just as you can set the Document Setup options with no document open, you can also set other defaults.

With no document open, go to the menu and choose those options you would like to set as a default. Whatever is available for you to choose can then be set as a default.



14 ***The*** Document Setup dialog box ***for an existing document.***



15 ***The*** Margins and Columns dialog box ***for an existing document.***

Changing Layout Options

You may discover that you need to change some of the settings of an existing document. When you start a new document, all the settings appear in one dialog box. However, after you begin working on the document you must use two separate controls to make changes to the document.

To change the document setup:

1. Choose File >Document Setup to open the Document Setup dialog box **14**.
2. Make whatever changes you want to the following settings:
   - Number of Pages
   - Facing Pages
   - Page Size
   - Orientation
   - Bleed and Slug
3. Click OK to apply the changes to the document.

To change the margins and columns:

1. Choose Layout >Margins and Columns to open the Margins and Columns dialog box **15**.
2. Make whatever changes you want to the following settings:
   - Margins
   - Number of columns
   - Gutter or the width of the space between the columns
3. Click **OK** to apply the changes to the document.

TIP Changing the margins and columns while on a page or spread changes the settings only for that page or spread. To change the settings for all the pages, you need to work with the Master Page. ***(See Chapter*** 10, ***"Pages and Books," for more information on master pages.)***

Using the Document Presets

You may want to save **all** the settings for certain types of documents so they can easily be applied when you start new documents. For instance, my Visual QuickStart books require different settings than the handouts I use when teaching. Document presets make it easy to apply the different settings when I create new documents.

To save the document settings as document preset:

1. Choose File > New > Document and set the options in the New Document dialog box.
2. Click the Save Preset button ⑯. This opens the Save Preset dialog box ⑰.
3. Enter a name for the preset in the Save Preset As field and click OK. This adds the preset to the Document Preset menu in the New Document dialog box.

To apply a document present:

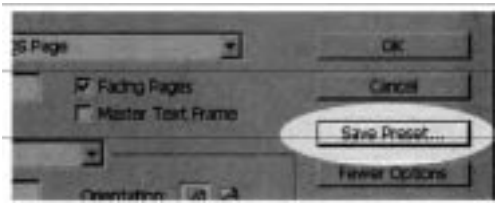
- Choose the document preset from the Document Preset menu in the New Document dialog box ⑱.

  or

  Choose File > Document Presets and then choose one of the presets listed in the menu. This opens the New Document dialog box with that preset chosen.

To edit a document preset:

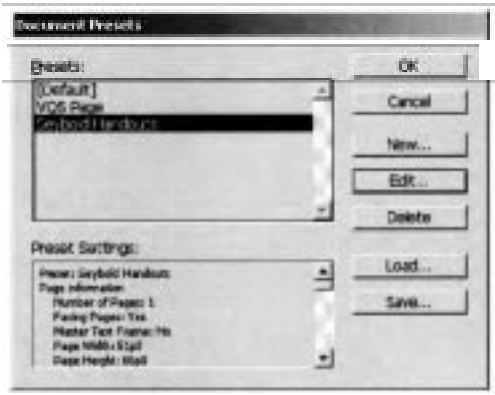
1. Choose File > Document Presets > Define. This opens the Document Preset dialog box.
2. Choose the document preset in the Document Preset dialog box, and click the Edit button ⑲. This opens the Edit Document Preset dialog box ⑳.
3. Make whatever changes you want. Click OK to save the changes in the preset.



⑯ ***Click the*** Save Preset button ***in the New Document dialog box to save the current settings as a preset.***

⑰ ***Enter a name for a document preset in the*** Save Preset As *field.*

⑱ ***You can apply presets using the*** Document Preset menu ***in the New Document dialog box.***



⑲ ***The*** Document Presets dialog box ***lets you edit, delete, and create new documentpresets.***

Use the Edit Document Preset dialog box *to make changes to existing documentpresets.*

You can also use the Document Presets dialog box to create document presets without going through the New Document dialog box.

To create a new document preset:

1. Choose File >Document Presets >Define. This opens the Document Preset dialog box.
2. Click the New button to open the New Document Preset dialog box.

TIP This dialog box is similar to the Edit Document Preset dialog box.

3. Use the dialog box to name and set the options for the new preset.
4. Click OK to save the preset.

To delete a document preset:

- Choose the document preset, and click the Delete button.

TIP You can't delete the [Default] preset.

You can also export document presets into a file that can be shared with others.

To export document presets:

1. Click the Save button in the the Document Preset dialog box.
2. Name and save the document preset file.

You can also import document presets from others.

To import document presets:

1. Click the Load button in the the Document Preset dialog box.
2. Naviagate to find the document preset file.
3. Click the Open button. The document presets are imported into InDesign.

Using Document Rulers

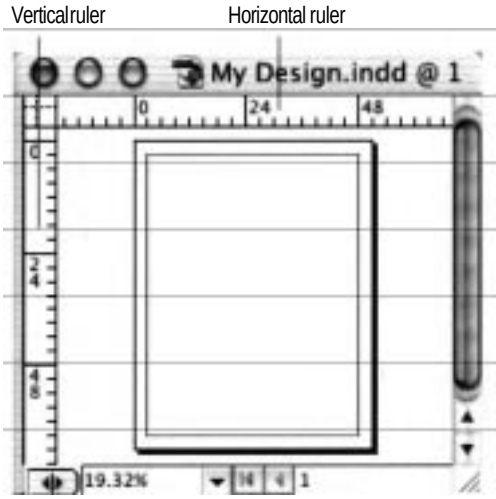
Designers need to measure things on their pages. Rather than hold a ruler up to your monitor, InDesign gives you electronic rulers you can customize or hide.

To show and hide the document rulers:

- To see the rulers along the top and left edges of the document window, choose View >Show Rulers ㉑.

  or

  To hide the rulers, choose View >Hide Rulers.



㉑ ***The*** horizontal and vertical rulers.

You can change the rulers to display different units of measurement. This is especially helpful if you receive instructions written in measurements with which you are not familiar.

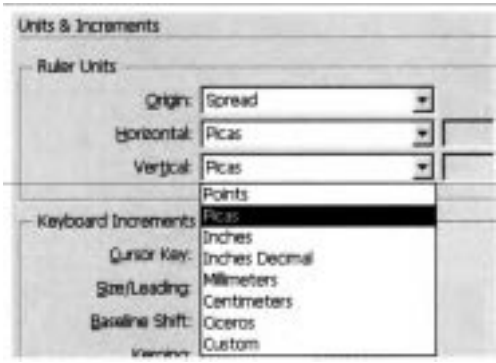
To change the unit of measurement:

1. Choose Edit >Preferences >Units & Increments (Win) or **InDesign** > Preferences >Units & Increments (Mac). This opens the Units & Increments dialog box.
2. For the Horizontal and Vertical settings, choose one of the measurements from the pop-up lists ㉒.

TIP You can have different units for the horizontal and the vertical rulers. For instance, the vertical ruler can match the document's leading so that each unit equals each line of copy. The horizontal unit can be in inches or picas.

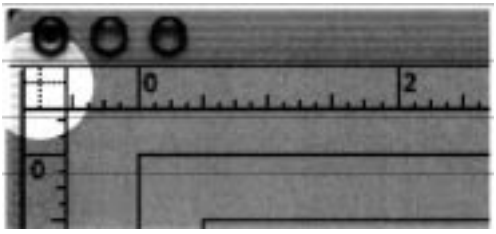
3. If you choose Custom, enter the number of points for each unit on the ruler.

TIP You can also change the units with the ruler contextual menus ㉓. ***(See page 16 for more information on how to access contextual menus.)***

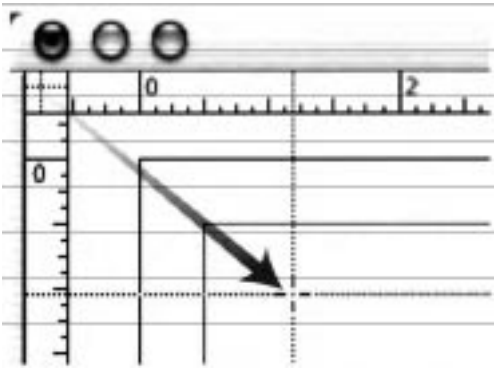


㉒ ***The choices for the*** rulers units of measurement.

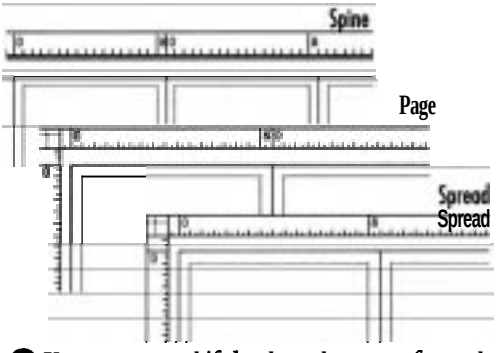
㉓ ***The contextual menu when clicked over a ruler.***



24 *The* zero point indicator *of the rulers.*



25 *You set the ruler's* zero point *by dragging the zero point indicator to a newposition on the page.*



26 *You can control if the the rulers reset for each spine or each page. They can also be set to stay across a spread.*

The rulers start numbering at the top-left corner of the page. You may want to move this point, called a ***zero point,*** to a different position. This might help you judge how much space you have from one spot of the page to another.

To reposition the zero point:

1. Position the cursor over the zero point crosshairs at the upper-left corner of the rulers 24.
2. Drag the zero point to the new position on the page 25.
3. Release the mouse button to position the zero point.

TIP Double-click the zero point crosshairs in the corner of the rulers to reset the zero point to the upper-left corner.

If you are working on a project such as an advertising spread, it may be easier to position objects if the rulers continue across the ***spine*** of the pages. ***(The spine is where the pages of a book, magazine, or other mutli-page document are bound together.)*** InDesign lets you customize the origin of the rulers.

To set the origin of the rulers:

1. Choose Edit >Preferences >Units & Increments (Win) or **InDesign >** Preferences >Units & Increments (Mac).
2. Set the Ruler Units Origin menu to Page, Spread, or Spine 26.

   or

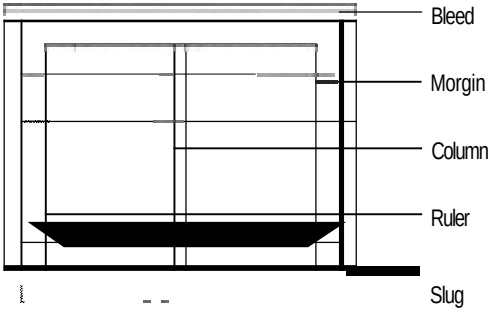
   Choose a setting from the ruler contextual menu 23.

TIP There is no difference between the page or spine settings unless there are more than two pages to the spread.

Working with Guides

Guides are nonprinting lines that help you position text and graphics on the page. InDesign has many different types of guides that you can work with .

- Ruler guides can be positioned anywhere on the page or pasteboard.
- Margin guides show the settings of the margins for the document.
- Column guides show the column settings for a page or master page *(see chapter* 10).
- Bleed guides show the bleed area for the document.
- Slug guides show the slug area for the document.

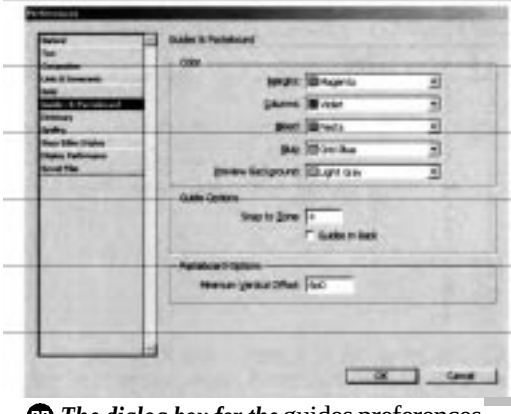


Examples of the various types of guides ***on a page.***

InDesign gives you options for how to work with guides.

To change the guide preferences:

1. Choose Edit >Preferences >Guides & Pasteboard (Win) or InDesign > Preferences >Guides & Pasteboard (Mac) to open the Guides & Pasteboard Preferences .
2. Use each of the menus to set the colors of the guides.
3. Check Guides in Back to position the guides behind text and graphics on the page .
4. Enter an amount in the Snap to Zone. This is the distance, in pixels, for how close an object must be before it will snap or jump to align with a guide.



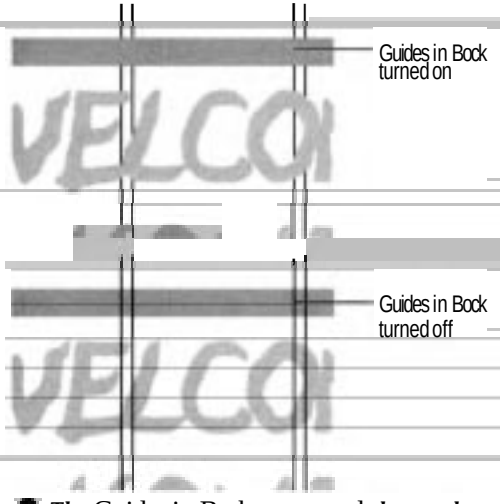
The dialog box for the guides preferences.

To show and hide guides:

- To see the margin, column, and ruler guides, choose View>Show Guides.

  or

  To hide the guides, choose View>Hide Guides.



The Guides in Back command ***changes how guides are displayed as they pass through text and artwork.***

30 *The* **two-headed arrow** *indicates that a column guide can be moved.*

Objects can be set to automatically snap to guides as you move them. This makes it easier to align objects to guides.

To make objects snap to guides:

- Choose View > Snap to Guides.

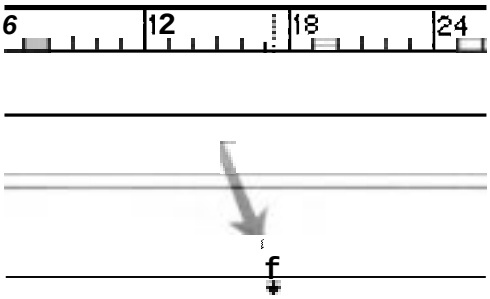
TIP Choose the command again to turn off the feature.

There may be times when you want to move a column guide manually. This results in a custom guide setting.

To move column guides:

1. Position the cursor over the guide you want to move.
2. Press the mouse button. The cursor turns into a two-headed arrow that indicates that the column has been selected **30**.
3. Drag the column guide to the new position.

TIP You cannot change the width of the gutter space between the columns by moving a column guide. But you can change it in the Margins and Columns dialog box *(see page 21)*.



31 *You can drag ruler guides out from the horizontal ruler or vertical ruler.*

Ruler guides are more flexible than margin or column guides and can be positioned anywhere on the page to help with object placement.

To create ruler guides:

1. Position the cursor over the horizontal or vertical ruler. *(See page 26 for how to display the rulers.)*
2. Press the mouse button. The cursor turns into a two-headed arrow.
3. Drag to pull the guide out onto the page **31**.

Rather than pulling guides out one at a time, you can also create a series of ruler guides in rows and columns.

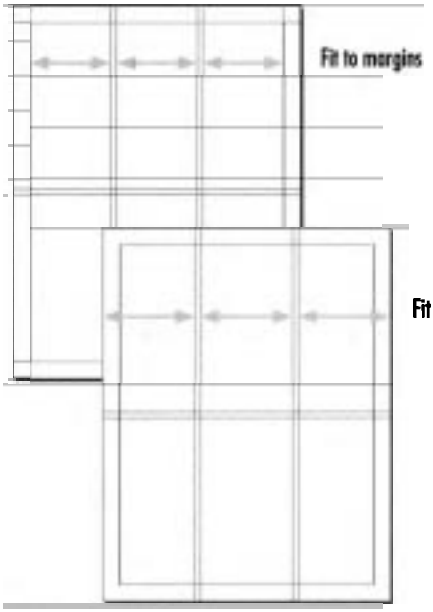
To create rows and columns using guides:

1. Choose Layout >Create Guides. This opens the Create Guides dialog box (32).
2. Enter the number of rows (horizontal guides) in the Rows Number field.
3. Enter the amount for the space between the rows in the Rows Gutter field.
4. Enter the number of columns (vertical guides) in the Columns Number field.
5. Enter the amount for the space between the columns in the Columns Gutter field.
6. Choose between Fit Guides to Margins or Fit Guides to Page (33).
7. Check Remove Existing Ruler Guides to delete **all** the ruler guides that were previously on the page. This includes ruler guides that were manually added to the page.
8. Click OK to apply the guides.

TIP Check Preview to see the guides on the page change as you enter the values within the dialog box.

TIP If you set the Number fields to zero for both the Rows and Columns, you can use the Remove Existing Ruler Guides setting as a quick way to delete all the ruler guides on the page.

(32) ***The* Create Guides dialog box *lets you automatically add many guides on a page.***

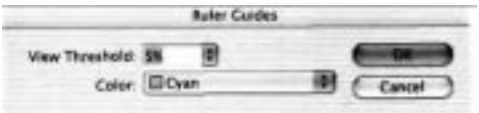


(33) **Fit Guides to Margin** ***spaces the guides equally inside the page margins.*** **Fit Guides to Page** ***spaces the guides equally inside the page trim.***

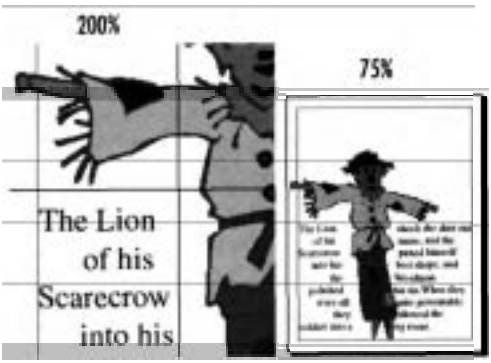
To reposition ruler guides:

1. Position the cursor over the guide you want to move.
2. Press the mouse button. The cursor turns into a two-headed arrow and the guide changes to a darker color. This indicates that the guide has been selected.
3. Drag the ruler guide to a new position.

34 *Use either of the* Selection tools *to select a ruler guide.*



35 *Use the* Ruler Guides dialog box *to change the color of the ruler guides. You can also set the threshold to determine at what magnification the guides are visible.*



36 *A* view threshold *of* 200% *means the guides are visible only when the magnification is 200% or higher.*

You can also manually move or delete ruler guides.

To move existing ruler guides:

- Use either of the Selection tools to drag the ruler guide to a new position 34.

To delete ruler guides:

1. Click the ruler guide with one of the Selection tools. The ruler guide turns a darker color, indicating it is selected.
2. Press the Delete/Backspace key. This deletes the ruler guide.

You may want to lock your ruler guides so they don't move inadvertently.

To lock guides:

- Choose **View >Lock** Guides.

TIP Choose the command again to unlock the guides.

Just as you can change margin guides, you can change the color of ruler guides. You can also set the magnification at which the guides are not visible.

To change the appearance of ruler guides:

1. Choose Layout >Ruler Guides to open the dialog box 35.
2. Use the Color pop-up list to pick the color for the ruler guides.
3. Set a percentage for the View Threshold. This sets the amount of magnification below which the ruler guides are not displayed 36.

TIP Increase the View Threshold if you have many guides on the page. This hides the guides at low magnifications and shows them at higher ones. *(See page 33 for setting the view magnifications.)*

Working With Document Grids

Ruler guides aren't the only way to align object. The document grid can also be used as a structure for designing pages. The baseline grid is used to keep lines of text even. ***(See page** 366 **for how to align text to the baseline grid.)***

To display the grids:

- Choose View >Show Document Grid or View>Show Baseline Grid.

To hide the grids:

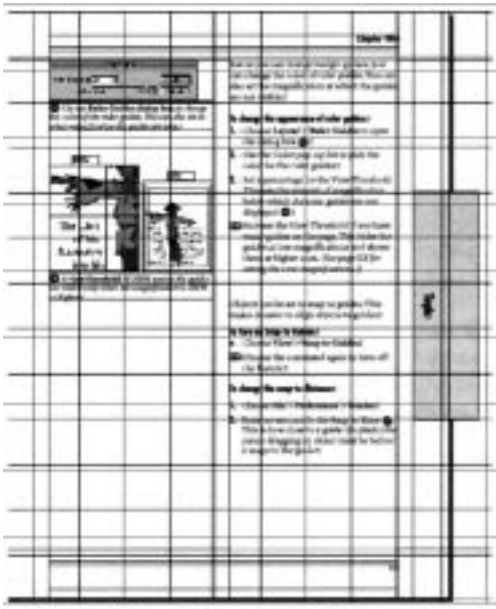
- Choose View >Hide Document Grid or View >Hide **Baseline** Grid.

To change the grid appearance:

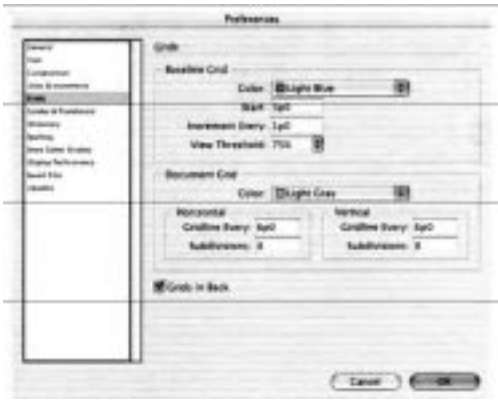
1. Choose Edit >Preferences >Grids (Win) or **InDesign** >Preferences >Grids (Mac) to open the Grids Preferences dialog box .
2. Use the Color pop-up list to change the grid color.
3. Enter an amount in the Horizontal and Vertical **Gridline** Every fields to set the distance between the main gridlines.
4. Enter an amount in the Subdivisions field to create lighter gridlines between the main gridlines.
5. Enter an amount in the Start field to set where the baseline grid should start.
6. Enter a percentage in the View Threshold field. This sets the lowest magnification at which the grid is visible.
7. Check Grids in Back to position the gridlines behind objects on the page, as shown on page 28 in figure .

To turn on Snap to Grid:

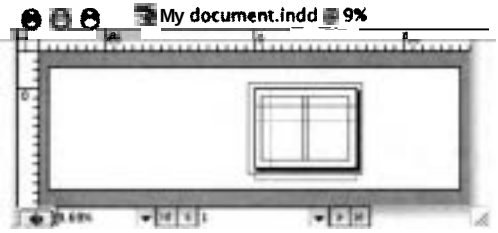
- Choose View>Snap to Document Grid. If Snap to Document Grid is checked, the feature is already turned on.



Choose **Show Document Grid** *to see the horizontal and vertical gridlines.*



The Grids Preferences dialog box ***lets you control the display and arrangement of the document grid.***



The Entire Pasteboard command *shows the page as well as the pasteboard.*

InDesign's "Smart" View Commands

If you have used other page layout programs, you may not realize how smart some of InDesign's View commands are. These are the commands Fit Page in Window, Fit Spread in Window, and Entire Pasteboard.

In most other programs, if you choose the Fit Page in Window command, the magnification changes to show the entire page. If you then change the size of the window, the magnification is no longer the correct size to show the entire page.

InDesign, however, is much smarter. When you choose those three View commands, InDesign continues to display the entire page, spread, or pasteboard even if you resize the window. The magnification dynamically changes as you change the size of the window.

The command will stay active until you choose a new view or manually change the magnification. That's pretty smart!

Changing the Magnification

Magnification refers to the size of the document as it appears on your screen. InDesign gives you many ways to change the magnification setting. Some of the quickest and easiest ways to change the magnification settings are to use View commands.

To zoom with the View commands:

1. To increase the magnification, choose View > Zoom In.
2. To decrease the magnification, choose View > Zoom Out.
3. To see **all** of the current page, choose View > Fit Page In Window. This changes the magnification setting to whatever amount is necessary to see the entire page.

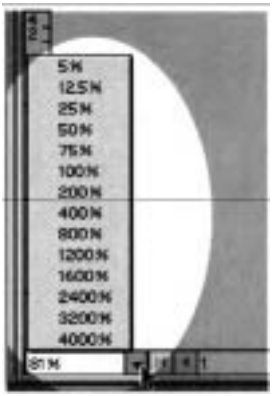
TIP A small monitor forces you to use small magnifications to see the entire page. A larger monitor allow you to set its resolution so that it shows the entire page at magnifications that are easier to read.

4. To see all of the current spread, choose View > Fit Spread In Window. *(See page* 20 *for more information on working with spreads.)*
5. To see the document at 100% magnification, choose View > **Actual** Size.
6. To see the entire pasteboard area, choose View > Entire Pasteboard.

InDesign lets you view the page with a wide range of magnification settings. You can select a specific magnification amount from the magnification list.

To use the magnification list:

1. Click the control at the bottom-left corner of the document window to display the magnification list (1).
2. Choose one of the magnifications in the list.



(1) The magnification list *at the bottom of the document window.*

You can also view specific magnifications not in the list.

To enter a specific magnification amount:

1. Double-click or drag across the magnification shown in the bottom-left corner of the document window.
2. Type a number between 5 and 4000.

TIP It is not necessary to type the % sign.

3. Press Return or Enter to apply the setting.

Magnification Shortcuts

Because the View commands are used so often, the keyboard shortcuts are listed here. You can also find these shortcuts listed on the View menu.

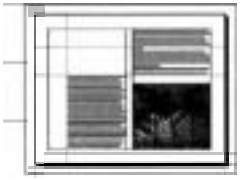
Mac Commands

Zoom In	Cmd-=
Zoom Out	Cmd-hyphen
Fit Page in Window	Cmd-0
Fit Spread in Window	Cmd-Opt-0
Actual Size	Cmd-1

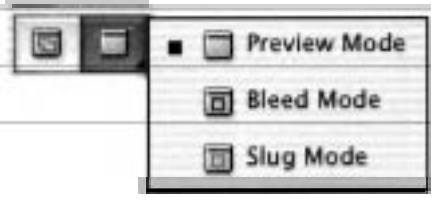
Windows Commands

Zoom In	Ctrl-=
Zoom Out	Ctrl-hyphen
Fit Page in Window	Ctrl-0
Fit Spread in Window	Ctrl-Alt-0
Actual Size	Ctrl-1

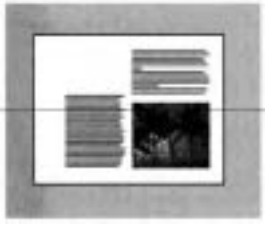
41 *Click the* Normal View Mode icon *to see all the elements of the document.*



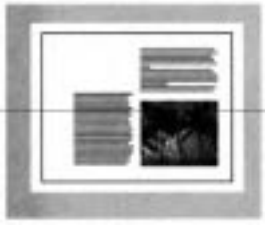
42 *The* Normal View Mode *shows all the elements of the document.*



43 *Choose one of the view modes to see specific areas in a Preview Mode.*



44 *The* Preview Mode *shows only the printing elements and hides the pasteboard.*



45 *The* Bleed Mode *shows only the printing elements and the bleed area.*

46 *The* Slug Mode *shows only the printing elements and the slug area.*

View and Pasteboard Controls

As you work, you may want to view your document in different ways. The four View modes provide different ways of looking at your document.

The Normal view mode is the default view and shows you all the guides in the document as well as the pasteboard, bleed, and slug areas.

To choose the four View modes:

- Click the Normal View Mode icon at the bottom of the Toolbox 41.
  - Normal View Mode is the default view and shows you all the guides in the document as well as the pasteboard, bleed, and slug areas 42.

  or

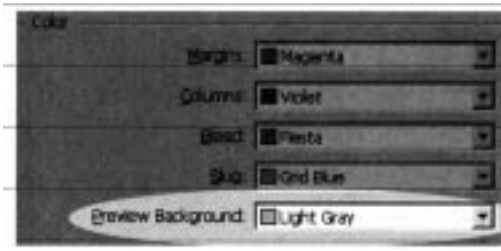
  Choose one of the view modes from the fly-out panel at the bottom of the Toolbox 43.
  - Preview Mode shows only the area inside the page boundaries. All guides are automatically hidden 44.
  - Bleed Mode adds the area inside the bleed to the Preview Mode 45.
  - Slug Mode adds the area inside the slug to the Preview Mode 46.

When you switch to the Preview Mode the pasteboard is replaced by a colored background. The default color is grey; but you can change that to any color you would like.

To change the Preview Background color:

1. Choose Edit > Preferences > Guides & Pasteboard (Win) or InDesign > Preferences > Guides & Pasteboard (Mac) to open the Guides & Pasteboard Preferences.
2. Use the Preview Background list to set the color for the background (47). This changes the color shown in the Preview Mode (48).

TIP Restrain yourself from changing the color to something extremely intense. A vivid color around a document can change how colors on the page appear.



(47) ***Use the*** Preview Background List ***to change the color of the pasteboard area shown in the Preview Mode.***

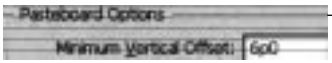
(48) A black background in the pasteboard area ***presents your work with a more dramatic appearance.***

The area above and below the document is controlled by the Minimum Vertical Offset. You can make that area larger.

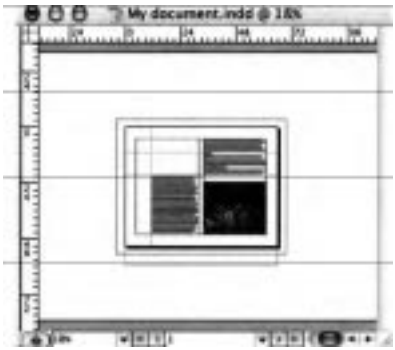
To change the Preview Background color:

1. Choose Edit > Preferences > Guides & Pasteboard (Win) or InDesign > Preferences > Guides & Pasteboard (Mac) to open the Guides & Pasteboard Preferences.
2. Enter an amount in the Minimum Vertical Offset field (49). This increases the pasteboard above and below the page (50).

TIP Some people who come to InDesign from other programs want to increase the vertical offset of the pasteboard to avoid problems when rotating objects so they stick off the pasteboard. Their old program wouldn't let them rotate objects in that manner. Fortunately, InDesign lets you rotate objects outside the pasteboard.

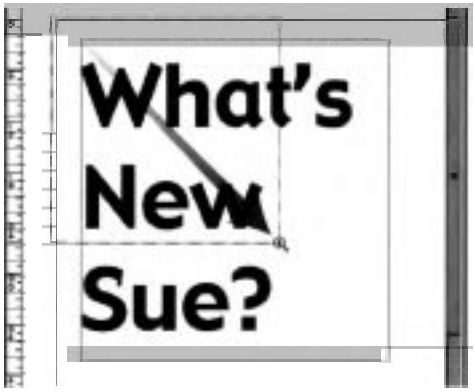


(49) ***Use the*** Minimum Vertical Offset field ***to increase the size of the pasteboard above and below the document.***



(50) ***The effects of increasing the size of the Minimum Vertical Offset.***

51 *Use the* Zoom tool *to change the magnification of the page.*



52 Drag the Zoom tool *diagonally to magnify a specific area. The marquee indicates the area to be selected.*

53 *The selected area fills the window after you release the mouse button.*

Using the Zoom and Hand Tools

The Zoom tool lets you jump to a specific magnification and position on the page. The Hand tool moves the view to a new position.

To use the Zoom tool:

1. Click the Zoom tool in the Toolbox 51. The cursor turns into a magnifying glass.
2. Click the Zoom tool on the area you want to zoom in on. Click as many times as is necessary to change the magnification.

TIP Press Cmd/Ctrl and Spacebar to access the Zoom tool without leaving the tool that is currently selected.

TIP Each click of the Zoom tool changes the magnification to the next setting in the magnification list.

TIP Press the Opt/Alt key while in the Zoom tool to decrease magnification. The icon changes from a plus sign (+) to a minus sign (–).

TIP Double-click the Zoom tool in the Toolbox to set the view to the actual size **(100%).**

A marquee zoom allows you to zoom quickly to a certain magnification and position.

To create a marquee zoom:

- Drag the Zoom tool diagonally across the area you want to see. Release the mouse button to zoom in 52 and 53.

You can also use the Hand tool (sometimes called the Grabber tool) to move around within the area of the document. This is more flexible than using the scrollbars which only go up and down or left and right.

54 *Use the* **Hand** *tool to move the page around the window.*

To use the Hand tool:

1. Click the Hand tool in the Toolbox 54.
2. Drag the Hand tool to move around the page.

TIP Double-click the Hand tool in the Toolbox to fit the entire page in the window.

If you want to become a true InDesign power user, you need to use keyboard shortcuts. One of the primary shortcuts you should learn is how to temporarily access the Hand tool without leaving the current tool. This lets you scroll around a document very quickly.

To temporarily access the Hand tool:

- Press the Opt/Alt plus Spacebars keys. This gives you the Hand tool in **all** situations.

TIP You can also access the Hand tool by pressing just the Opt/Alt key if you are working in a text frame.

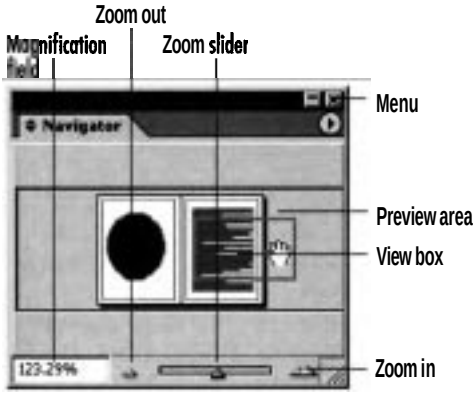
Playing the Keyboard "Bass Notes"

I confess! I haven't chosen the Zoom or Hand tools in years. Rather than move the mouse all the way over to the toolbox, I use the keyboard shortcuts.

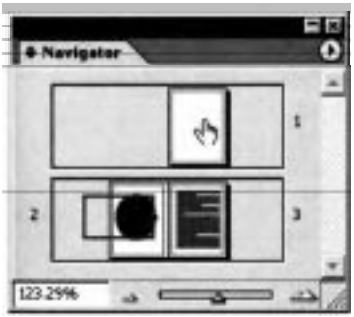
On the Mac, I keep my fingers lightly resting on the Cmd, Opt, and Spacebar keys. By changing which keys are pressed, I alternate between the Zoom In, Zoom Out, and Hand tools.

On Windows, I do the same thing with the Ctrl, Alt, and Spacebar keys.

So, as my right hand moves the mouse around and taps other keys on the keyboard, my left hand is always playing the three bass notes of the keyboard.



The elements of the Navigator palette.



When View All Spreads is chosen, the Navigator displays all the spreads in the document.

Using the Navigator Palette

The Navigator palette combines the functions of both the Zoom and Hand tools. As you change the views in the Navigator, you change the views in your document.

TIP Enlarge the size of the Navigator palette to see more details in your document.

To use the Navigator zoom buttons:

1. If the Navigator palette is not already open, choose Window >Navigator. This opens the Navigator palette 35.
2. Click the Zoom In button to increase the magnification.
3. Click the Zoom Out button to decrease the magnification.

To set a specific magnification:

1. Highlight the value in the Magnification field and enter the specific magnification.
2. Press Return or Enter.

To use the Zoom slider:

- Drag the Zoom slider to the right to increase the magnification.

  or

  Drag the slider to the left to decrease the magnification.

The Navigator palette can display a single spread or all the spreads in the document.

To change the view spread options:

- Choose View *All* Spreads from the Navigator palette menu. This displays **all** the spreads in the document 35.

TIP When you choose View All Spreads, the menu choice changes to View Active Spread. This displays only the currently selected spread. *(See Chapter* 10, *"Pages and Books," for more information on working with spreads.)*

The Preview Area within the Navigator palette can also be used to move around the document.

To move using the Navigator Preview area:

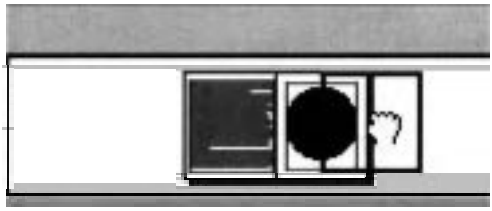
1. Position the cursor inside the Preview area of the Navigator palette. The cursor changes into a hand 57.
2. Drag the Hand around the Preview area. The Preview Box moves to change the area displayed within the document window.

TIP Notice how the Hand cursor turns into an animated fist as it grabs the page to move around the document. Cute!

The View Box is the rectangle that shows the size of the area displayed in the document window. You can change the color of that rectangle so that it is more easily seen against the color of your document pages.

To change the color of the View Box:

1. Choose Palette Options from the Navigator menu. This opens the Palette Options dialog box 59.
2. Use the Color list to pick a new color.



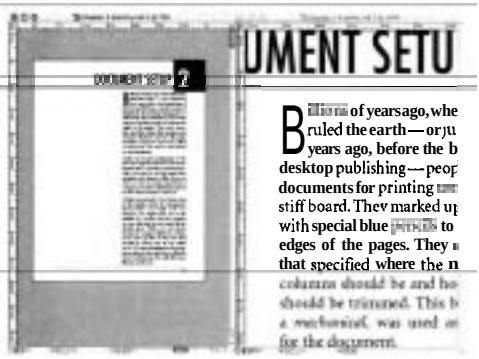
57 ***The*** Hand cursor ***inside the Preview area of the Navigatorpalette.***

59 ***The*** Palette Options ***let you change the color of the View box inside the Navigator palette.***

Too Many Navigation Choices

Between the document scrollbars, the Hand tool, the Navigator palette, and the page controls *(covered in Chapter 10, "Pages and Books")* you may feel a little overwhelmed as to all your choices for moving around a document. Here are some guidelines as to when to use what:

- Use the Hand tool for short distances.
- Use the Navigator palette if you need some visible clues as to where you are moving.
- Use the page controls such as the Pages palette if you need to jump across many pages in a document.



Two views** of **the same document set as tiled windows.

Controlling Windows

The window commands let you view one document in two windows and control the display of multiple windows.

To see a document in two windows:

1. Choose Window > Arrange > New Window. This creates a second window containing the document.
2. Choose Window > Arrange > Tile. This changes the size of the two windows and positions them side by side on your screen.

   or

   Choose Window > Arrange > Cascade. This stacks all the open windows so that their title bars are visible.

In the Macintosh OS X operating system, the windows for InDesign documents may be obscured by other application windows. Fortunately there a command that lets you move all the InDesign windows to be seen at the front of the screen.

To control the order of documents (Mac):

- Choose Window > Arrange > Bring All To Front. This moves all the InDesign documents to the front of the stacking order of all other applications.

File Maintenance

After you work on a document for even a little while, you must save your work to a hard drive or disk. This is vital so that you don't lose important information should your computer crash in a power blackout or you do something stupid.

To save and name a file (Win):

1. Choose File >Save or File >Save As. This opens the Save As dialog box 60.
2. Use the Save In field to choose a destination disk and folder for the file.
3. Use the File Name field to name the file.
4. Use the Save As Type field to choose between an InDesign document or an InDesign Template.
5. Click Save to save the file and close the dialog box.

To save and name a file (Mac):

1. Choose File >Save or File >Save As. This opens the Save As dialog box 61.
2. Use the Macintosh navigational elements to choose a destination disk and folder for the file.
3. Use the Name field to name the file.
4. Use the Format pop-up list to choose between an InDesign document or an InDesign Template.

TIP The template format saves the file so that each time it is opened, it opens as an untitled document. This protects the document from inadvertent changes.

5. Click Save to save the file and close the dialog box.

As you work, you may want to spin off a copy of your document under another name. The Save a Copy command makes this easy to do.

60 The Save **As** dialog box ***(Win).***

61 The Save **As** dialog box **(Mac).**

The Three Different Save Commands

The first time you look under the File menu you may be a little confused by the three different commands for saving documents. What are the differences between Save, Save As, and Save a Copy?

The first time you save an untitled document, there is no difference between choosing **File > Save** and **File > Save As**. Both commands bring up the Save As dialog box.

Once you have named a file, the Save command adds new work to the file without changing the file's name. The Save As command will always open the dialog box where you can change the file's name or location.

I use the Save command almost all the time. That way I only have to remember one keystroke: Cmd/Ctrl-S. The only time I use the Save As command is if I want to change the name of a document or save it somewhere else.

The **File > Save A Copy** command is different. When you save a copy, you can save the file under a new name. However, unlike the Save As command, you continue to work on the file you were working on.

I use the Save a Copy command when I am about to do something strange or bizarre to my work. The Save a Copy command lets me create a version of the file that I know I can fall back on.

To create a copy of a document:

1. Choose File >Save a Copy. This opens the Save As dialog box.
2. Use the same steps as described in the two previous exercises to save the file.
3. Click Save. The copy of the document is saved while you can continue to work on your current file.

There may be times when you want to revert to the previously saved version of a document without saving any changes.

To go back to the saved version of a document:

- Choose File >Revert. The file closes and then reopens to where it was when last saved.

To undo the steps you have done:

- Choose Edit >Undo [Action].

TIP Repeat this command as often as necessary.

To redo the steps you have done:

- Choose Edit >Redo [Action].

To close a document:

- Choose File >Close.

  or

  Click the Close box in the document window.

It happens—someday, somehow your computer will crash or you will be forced to restart it without saving your work. Fortunately InDesign has an automatic recovery option that can save your work.

To recover a file:

1. Restart the computer after the crash or data loss.
2. Start InDesign. Any files that were open when the crash occurred will be automatically opened.
3. Choose File >Save As to save the file with a new name and destination.

TIP The restored data is a temporary version of the file and must be saved in order to ensure the integrity of the data.

InDesign gives you options for opening and closing files.

To open a file within InDesign:

1. Choose File >Open.
2. Use the navigation controls to select the file you want to open.

TIP You can also open a document by double-clicking its icon.

To open recently saved documents:

- Choose File >Open Recent and then choose one of the files listed in the submenu.

TIP InDesign lists the 10 last-opened documents in the submenu.

Opening QuarkXPress or PageMaker Files

InDesign can convert documents and templates from QuarkXPress 3.3 (or later) and Adobe PageMaker 6.5 (or later). Simply choose File >Open and choose the file. InDesign converts the file into a new InDesign document.

How good is the conversion? It's great for templates that consist of the layout without any text. All the master pages *(see page 345)* are converted along with the style sheets *(see page 328)* and colors *(see Chapter 5)*. This lets you use your old templates to produce new work in InDesign. Graphics pasted via the clipboard—not placed using the Place or Get Picture commands—into QuarkXPress or PageMaker are not converted.

The conversion may change documents with lots of text. For instance, InDesign arranges type with a very sophisticated composition engine *(see page 359)*. This means that text could move to new lines when it appears in the InDesign document.

If you need to make just one or two small changes to an old document, you're better off opening the file in QuarkXPress or PageMaker and making the changes to the original files.

However, if you need to completely redo a document, export the text from the file, and then use InDesign to convert the template into an InDesign file. You can then use that template for all new documents.

BASIC TEXT 3

When I started in advertising around twenty-five years ago, setting type was an involved process. First, the copywriter typed out the text on pieces of paper. The art director or typographer then marked up the page of copy with a red pencil to indicate the typeface, point size, leading, and so on. Then, the copy was sent to a typesetting house where a typesetter retyped the text into a special typesetting machine. The text was printed onto special photographic paper and sent back the next morning. The copywriter then had to proof the text to make sure that there were no errors.

That's why I am amazed every time I use a program such as InDesign to set text. I don't type the copy onto a piece of paper; I type right onto my actual layout. I don't have to send the copy out overnight; it's right there on my computer screen. And I know that the only mistakes are the ones I make myself!

Creating Text Frames

InDesign holds text in objects called *frames.* Before you can start typing text, you need to create a text frame. The easiest way to do this is with the Type tool.

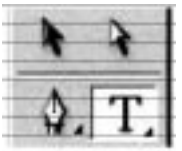
TIP You can resize or reshape text frames like you can other objects. *(See Chapter 4, "Working with Objects" for more details on creating and working with objects.)*

To create a text frame with the Type tool:

1. Click the Type tool in the Toolbox ❶.
2. Move the cursor to the page. The cursor changes to the Type tool cursor ❷.
3. Drag diagonally to create the frame ❸.

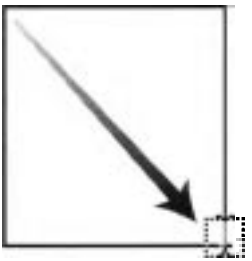
TIP The frame starts from the horizontal line that intersects the text frame cursor.

4. Release the mouse button. The text frame appears with an insertion point that indicates you can type in the frame.



❶ *Choose the* **Type tool** *in the Toolbox to work with text.*

❷ *The cursor set to create a text frame.*



❸ *Drag diagonally with the Type tool to* **create** *a* **text frame.**

The Type tool will always create rectangular frames. However, you can use the frame tools to create other geometric shapes such as ellipses and polygons to hold text.

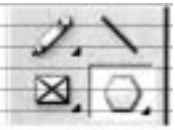
TIP The frame tools also lets you use numerical settings to specify the exact dimensions of a frame *(see page 48)*.

❹ *The* **Ellipse tool** *in the Toolbox.*

To draw an elliptical frames:

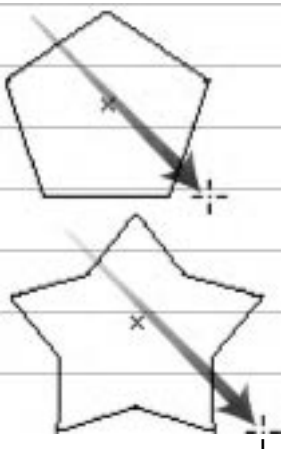
1. Click the Ellipse tool in the Toolbox ❹.
2. Drag diagonally to create the ellipse ❺.
3. Release the mouse button when the ellipse is the correct size.
4. Click the Type tool inside the frame to convert it to a text frame.

❺ *Drag diagonally to* **create an ellipse.**



❻ *The* Polygon tool *in the Toolbox.*

❼ *Use the* Polygon Settings dialog box *to change the shape and the number of sides of a polygon.*



❽ *Drag diagonally to* create polygons or stars.

The Polygon tool also lets you draw stars as well as ordinary polygons.

To draw a polygon frame:

1. Double-click the Polygon tool in the Toolbox ❻. This opens the Polygon Settings dialog box ❼.
2. Enter a number in the field for the number of sides.
3. Leave the Star Inset amount as 0%. If you increase the star inset, you create a star. *(See the next exercise.)*
4. Drag across the page to create the polygon ❽.

TIP Press the up or down arrow keys as you drag to increase or decrease the number of sides of the polygon.

5. Release the mouse button when the polygon or star is the correct size.
6. Click the Type tool inside the frame to convert it to a text frame.

To create a star frame:

1. Double-click the Polygon tool in the Toolbox to open the Polygon Settings dialog box ❼.
2. Enter a number in the Number of Sides field for the number of outer points.
3. Enter a value for the Star Inset amount. The greater the amount, the sharper the points will be.
4. Drag to create the star ❽.

TIP Press the up or down arrow keys as you drag to increase or decrease the number of points of the star.

TIP Press the left or right arrow keys as you drag to increase or decrease the star inset.

5. Release the mouse button when the star is the correct size.
6. Click the Type tool inside the frame to convert it to a text frame.

Unassigned Frames

The Ellipse, Polygon, and Rectangle tools create frames that are unassigned. This means they hold neither text nor graphics. But don't let the unassigned designation mislead you. It doesn't really matter if a frame is unassigned or not.

You can convert unassigned frames to hold text *(see page 48)*, or you can convert unassigned frames to hold graphics *(see page 183)*.

You can also create rectangular frames using the Rectangle tool.

To draw a rectangular frame:

1. Click the Rectangle tool in the Toolbox ❾.
2. Drag diagonally to create the rectangle ❿.
3. Release the mouse button when the rectangle is the correct size.
4. Click the Type tool inside the frame to convert it to a text frame.

The Elliptical and Rectangular frame tools let you numerically specify the frame size.

To set the size of a frame numerically:

1. Choose the Ellipse or Rectangle tool from the Toolbox.
2. Position the cursor where you want to create the frame.
3. Click. A dialog box appears ⓫.
4. Set the Width and Height of the frame.
5. Click OK. The frame appears with its upper-left point where you first clicked.

TIP Hold the Opt/Alt key as you click to position the centerpoint of the frame at that point.

Frames created with the Ellipse, Polygon, and Rectangle tools must be converted to use as text frames.

To convert unassigned frames:

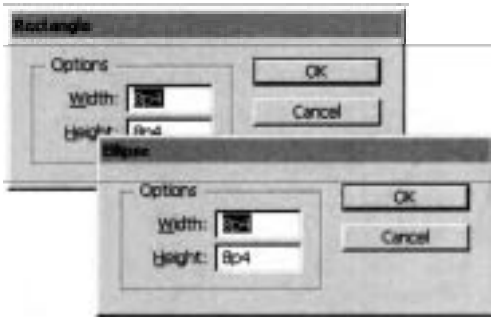
1. Select the frame you want to convert.
2. Choose the Type tool and click inside the frame.

   or

   Choose Object>Content>**Text**. An insertion point appears indicating that you can begin typing.

❾ ***The*** Rectangle tool ***in the Toolbox.***

❿ ***Drag diagonally to*** create a rectangle.

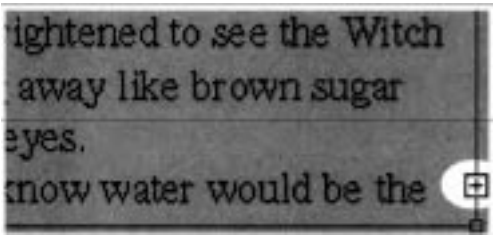


⓫ ***The*** Ellipse and Rectangle dialog boxes ***let you specify the width and height of a frame.***

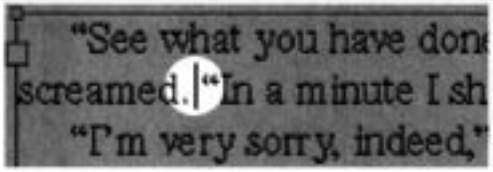
Tips for Drawing Frames

There are several keyboard shortcuts you can press as you draw frames:

- Hold the **Shift key** to constrain the frame to a square, circle, or uniform polygon.
- Hold the **Opt/Alt key** to draw the frame from the center outward.
- Hold the **Spacebar** to reposition the frame as you draw.



⓬ *The* overflow symbol *indicates that there is more text than will fit in the frame.*



⓭ *The* blinking insertion point *indicates where text will be added.*

Typing Text

The two most important parts of working with text are typing the text and then selecting it to make changes.

To type text:

1. Click with the Type tool in a frame.
2. Begin typing.
3. Press Return to begin a new paragraph.

   or

   Press Shift-Return to begin a new line without starting a new paragraph.

TIP InDesign automatically wraps text within the text frame.

TIP If the text frame is too small to display all the text, an overflow symbol appears ⓬. You can reshape the box *(see page* 84) or flow the text into a new frame *(see page* 68) to eliminate the overflow.

To add text into a passage you have already typed, you move the *insertion point* to where you want to place the new material. The point blinks to help you find it ⓭.

To move the insertion point:

1. Position the Type tool cursor where you want the insertion point.
2. Click to set the insertion point.

To move the point using the keyboard:

1. Use the arrow keys to move the insertion point left or right one character at a time or one line at a time.
2. Use the Cmd/Ctrl key with the arrow keys to move the insertion point one word or one paragraph at a time.

Selecting Text

The simplest way to select text is to use the mouse.

To select text using the mouse:

- Press and drag across the text. The highlight indicates which text is being selected.

TIP You don't have to drag from left to right to select multiple lines. Simply drag down.

Like other programs, InDesign has special techniques to select words, lines, and paragraphs with the mouse.

To select a single word:

- Double-click within a word to select it and the space following it ⓮.

TIP A double-click selects both halves of a hyphenated word.

To select a single line:

- Triple-click within the line ⓯.

TIP Turn on Triple Click to Select a Line in the Text preferences *(see* page 488).

To select a paragraph:

- If Triple Click to Select a Line is turned off, triple-click within the paragraph ⓰.

  or

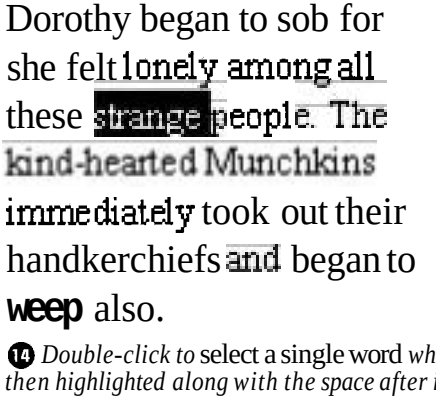
  If Triple Click to Select a Line is turned on, quadruple-click in the paragraph.

To select all the text in a frame or story:

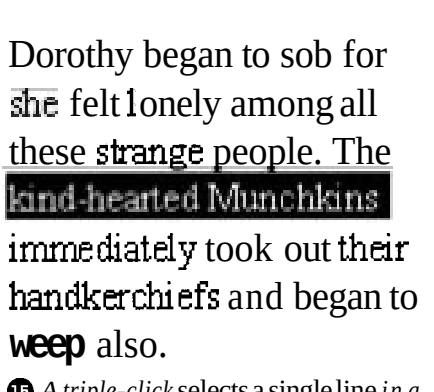
- If Triple Click to Select a Line is turned off, quadruple-click within any paragraph.

  or

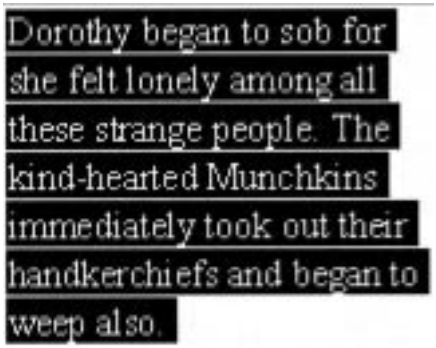
  If Triple Click to Select a Line is turned on, quintuple-click in any paragraph.



⓮ *Double-click to* select a single word *which is then highlighted along with the space after it.*



⓯ *A triple-click* selects a single line *in a paragraph.*



⓰ *An example of how a triple-click or quadruple-click can* select a paragraph.

Keyboard, Mouse, or Menu?

One of the hot topics in working with software is the keyboard-versus-mouse debate. If you are a fast typist, you will work faster using keyboard shortcuts. There are times when you may consider using a mouse.

If my hands are already on the keyboard, I try to keep them there to select text or apply a formatting change.

But if my hands are on the mouse, I try to use it. So if I've just finished moving a text frame to a new position, I can easily highlight the text with the mouse.

Menu commands are another matter entirely. I try whenever possible to learn the keyboard shortcuts for menu commands.

That way I don't have to move the mouse all the way up to the top of the page to choose a command such as Cut, Copy, or Paste *(see page 82)*.

Quick Guide to the Shortcuts

Here are some easy ways to understand the selection shortcuts:

- The up, down, left, and right arrow keys all jump around the text.
- Add the Cmd/Ctrl keys to make the bigger jumps. Instead of a character, you jump a word. Instead of a line, you jump a paragraph. (Remember: you have more power when you take *Command* or *Control!*)
- Adding the Shift key lets you select the text. The *S* in *Shift* stands for *Select.*

If you spend a lot of time typing and modifying text, you should learn the following techniques for selecting text.

To select text using keyboard shortcuts:

1. Use the following keyboard commands to select text using the keyboard:

Keystroke	Selects
Shift key and tap the left or right arrow key	Single character.
Shift key and tap the up or down arrow key	One line of text. Repeat to select additional lines.
Cmd/Ctrl+Shift keys and tap the left or right arrow key	One word and the space following it.
Cmd/Ctrl+Shift keys and tap the up or down arrow key	Paragraph.
Shift key and tap the Home or End key	All the text to the beginning or end of a line.
Cmd/Ctrl+Shift keys and tap the Home or End key	All the text to the beginning or end of a text frame or story.
Cmd/Ctrl+A	All the text within an entire text frame or story.

2. Repeat any of the above commands to select additional text.

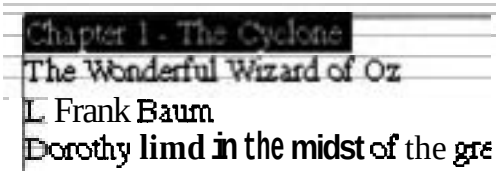
TIP You can switch commands to first select a line and then the following word.

TIP Once text is selected, you can use the above commands in reverse to deselect the text.

TIP You can quickly switch to editing inside a text frame by double-clicking with either selection tool. The tool will switch to the Type tool and place an insertion point where you double-clicked.

Moving and Deleting Text

You can copy or move text from one place and then paste it into another. Text that is copied or cut is stored on the computer *clipboard. (See the sidebar on this page for an explanation of how the clipboard works.)*



⓱ *Select text in order* **to copy or cut** *it from one position to another.*

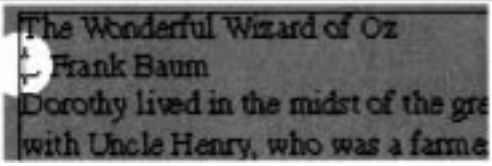
To copy and paste text:

1. Select the text or text frame ⓱.
2. Choose Edit >Copy or Cut.

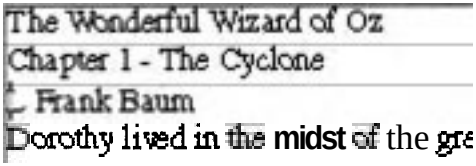
TIP If you choose Cut, the highlighted text disappears and the remaining text reflows.

3. Position the insertion point where you want to put the copied or cut text ⓲.
4. Choose Edit >Paste. The text is inserted into the new position ⓳.

TIP You can select text before pasting to replace the selected text with the copied text.



⓲ *Click to put the insertion point where you want* **to insert the copied or cut text.**



⓳ *The Paste command inserts the copied or cut text at the insertion point.*

The Duplicate command copies and pastes in one step. It also leaves the contents of the clipboard untouched.

To duplicate text:

1. Select the text or text frame.
2. Choose Edit >Duplicate. The copied text is duplicated as follows:

   A text frame is created slightly offset from the original object.

   - Text inside a frame is pasted immediately following the original text.

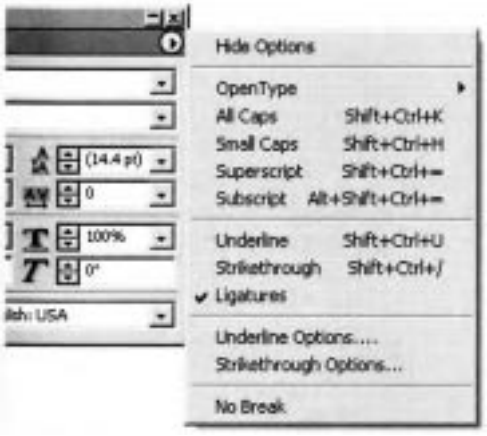
TIP The Duplicate command does not replace the contents of the clipboard.

What is the Computer Clipboard?

The Copy command places the copied objects into an area of the computer memory called the *clipboard*. The contents of the clipboard stay within the memory until a new copy or cut command is executed or until the computer is turned off.

The clipboard can hold only one set of information at a time. So if you copy one sentence, you will lose it from the clipboard if you copy or cut something else later on.

20 *The* Character palette *lets you change the character attributes.*



21 *The* Character palette menu *contains additional controls for formatting text.*

Using the Character Palette

Character formatting refers to attributes that can be applied to a single character or glyph in a paragraph without applying that formatting to the entire paragraph. The Character palette controls character attributes.

TIP As you work with text frames, the Control palette changes to display many of the text controls found in the Character palette. This makes it possible to style text using just the Control palette. See "Using the Control Palette for Text" at the end of this chapter for how to use the Control palette to style text.

To work with the Character palette:

1. If the Character palette is not visible, choose Window >Type >Character or Type >Character. This opens the Character palette 20.

   or

   Click the Character palette tab to move it to the front of a set of nested palettes.

2. Click the palette tab to reveal **all** the palette options.

   or

   Choose Show Options from the Character palette menu 21.

TIP The Character palette menu also contains additional controls for formatting text.

Setting the Typeface and Point Size

The design of type is called the ***typeface.*** The typeface you are reading now is called Minion. The typeface of the subhead below is called Futura Condensed Bold.

To choose a font (typeface):

1. Choose **Type** >Font and then choose the typeface from the font menu.

   or

   In the Character palette, choose a typeface from the font menu ㉒.

2. If necessary, choose the styling for the font from the style menu next to the name of the font.

   or

   Use the style list in the Character palette to choose the styling ㉓.

TIP The style list changes depending on the typeface and the parts of the typeface you have installed. If you do not have the bold version of a font, it will not be listed.

TIP You can use the keyboard commands to apply styling such as regular, bold, italic, and bold italic ***(see the Appendix).***

The size of type is measured using a system called ***points.*** There are 72 points per inch. The point size of this text is 10.25.

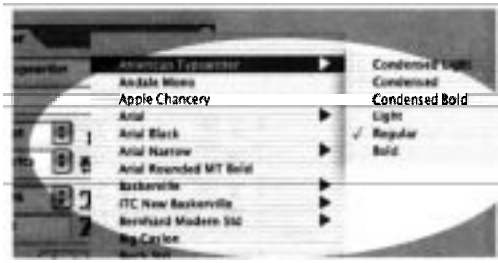
TIP Traditional typesetting measured 72.27 points per inch. However, most electronic desktop publishing programs round that size off to 72 points per inch.

To change the point size:

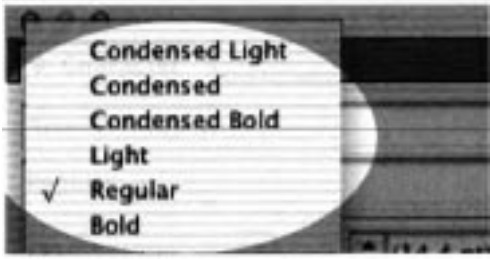
- Choose **Type > Size** and then choose a point size from the list ㉔.

  or

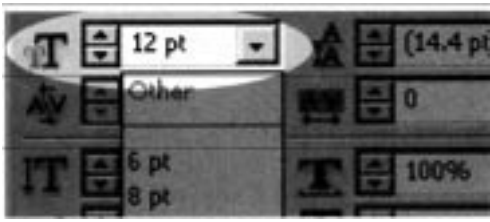
  Use the point size field controls to enter a custom point size.



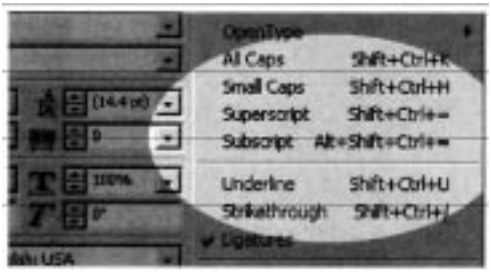
㉒ ***The*** font menu ***in the Character palette lets you choose the typeface for text. The style menu next to each font name displays the style choices.***



㉓ ***The*** style menu ***in the Character palette lets you choose the proper style choices for a typeface.***



㉔ ***The*** point size menu ***in the Character palette lets you choose common point sizes or enter a specific size in the field.***



25 *The* electronic style options *in the Character palette menu.*

Dorothy and TOTO — All caps

L. FRANK BAUM — Small caps

Emerald City® — Superscript

H_20 — Subscript

Tin Woodman — Underline

~~Cowardly Lion~~ — Strikethrough

26 *Examples of the electronic styles applied to text.*

27 *Applying the* Ligatures command *to the top text replaces specific pairs of letters with combination letter forms such as those on the bottom.*

Styling Text

InDesign also lets you apply electronic styling such as ***All*** Caps, Small Caps, Subscript, and Superscript. *(Seepage 60 for a discussion about electronic styling.)*

To apply electronic styles:

- Choose one of the styles listed in the Character palette menu 25. The text changes to the style chosen 26.
  - All Caps converts lowercase letters to all capital letters.
  - Small Caps converts lowercase letters to reduced capital.
  - Superscript reduces and raises the text above the baseline.
  - Subscript reduces and lowers the text below the baseline.
  - Underline draws a line under the text. *(See the next page for how to customize the appearance of the underline.)*
  - Strikethrough draws a line through the text. *(See the **next page** for how to customize the appearance of the strikethrough line.)*
  - Ligatures automatically substitutes the combined letterforms for characters such as fi and fl 27.

TIP The ***All*** Caps style has no effect on text typed with the Caps Lock or Shift key held down.

TIP The sizes of the Small Caps, Subscript, and Superscript are controlled in the text preferences *(see page* 488).

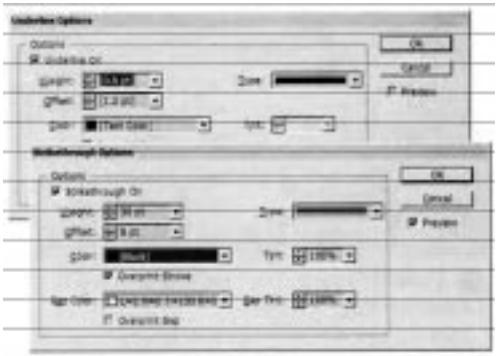
As mentioned on the previous page, you can change the appearance of the Underline and Strikethrough effects.

To customize Underline and Strikethrough Options:

1. Select the text.
2. Choose Underline Options or Strikethrough Options from the Character palette menu. The Underline Options or Strikethrough Options dialog box appears 28.
3. Click Underline On or Strikethrough On to turn on the effect.

TIP The effect will already be on if it was applied in the Character palette menu.

4. Use the Weight controls to set the thickness of the line.
5. Use the Offset controls to move the line as follows:
   - Positive underline numbers move the line ***below*** the baseline.
   - Positive strikethrough numbers move the line ***above*** the baseline.
6. Choose one of the rules from the Type list *(**see**page* 147 *for working with rules)*.
7. Choose a color and tint from the Color and Tint lists.
8. If your line type has a gap, such as in a dashed line, use the Gap Color and Gap Tint lists to color the gap.
9. If desired, check the Overprint Stroke or Overprint Gap options. *(**See**page 136 for more information on overprinting colors.)*



28 *The* **Underline Options** *and* **Strikethrough Options dialog boxes** *let you customize the appearance of the Underline and Strikethrough effects.*

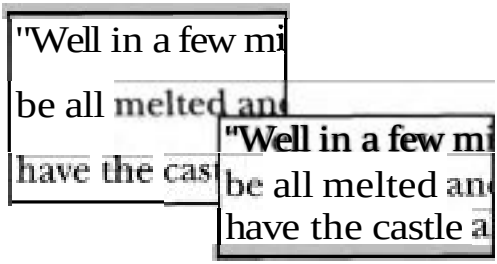
Underlines as Highlights!

One of the most exciting uses for the custom underlines and strikethrough effects is to use them as highlights for individual lines or words of text. This is something designers have wanted to do for years.

All you have to do is set the weight of the line to slightly thicker than the text point size. And use the offset to position the line around the text. You can then apply these custom underlines as highlights for text. You can also combine the underline and strikethrough lines above and below the text 29.

The Wonderful Wizard of OZ

29 *An example of how custom underlines and strikethrough settings can be used for highlights and other special effects.*



30 *The 24-point leading (top) has more line space than the 16-point leading (bottom).*

31 *The* Leading controls *in the Character palette let you change the amount of space between lines.*

Setting Line and Character Spacing

Leading is the space between lines of type within a paragraph 30. (It is pronounced *ledding,* which refers to the metal formerly used to set type.) Leading is specified as an absolute point size or as auto leading. The leading of this paragraph is 10.75 points.

To set the leading:

1. Select the paragraph of text.
2. Use the leading controls in the Character palette to enter an amount of leading 31.

   or

   Set the leading to auto to have the leading automatically change to an amount based on the point size.

TIP The amount of the auto leading is set in the Paragraph palette Justification menu *(see page* ***363).***

32 *A comparison of the different kerning settings: 0 (top), Metrics (middle), Optical (bottom).*

Kerning is the space between two letters. It is applied so letters fit snugly together 32.

To set kerning:

1. Select the text you want to kern or place an insertion point between the letters.
2. To use the kerning pairs in the typeface, choose Metrics from the kerning list 33.

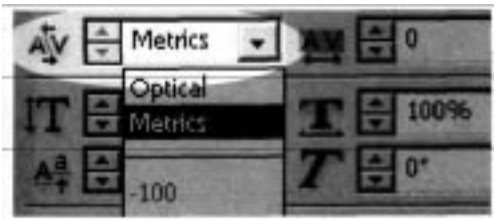
   or

   Choose Optical to adjust the kerning using a visual representation of the text.

TIP Use optical kerning when there are no built-in font metrics, for instance, when you combine two different typefaces.

3. To apply a specific kerning amount, use the kerning controls or pop-up menu to apply a numerical amount.

TIP Positive numbers increase the space. Negative numbers decrease the space. Zero indicates no kerning is applied.



33 *The* Kerning controls *in the Character palette change the space between characters.*

Tracking is similar to kerning; however, unlike kerning which applies to letter pairs, tracking is applied to a range of letters 34. Tracking is very useful because as you increase the space between the letters you don't lose the relative spacing that is applied by kerning.

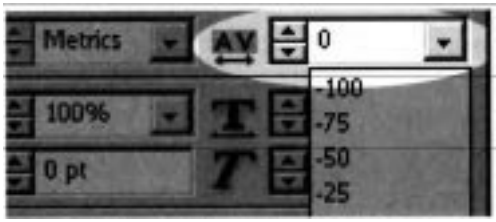
The Emerald City
The Emerald City

34 *Tracking of 100 increases the space along all the letters.*

To set tracking:

1. Select the text you want to track.
2. Use the tracking field controls in the Character palette to set the amount of tracking 35.

TIP Positive numbers increase the space between letters. Negative numbers decrease the space. Zero indicates no tracking is applied.



35 *The* Tracking controls *in the Character palette change the space across a sequence of letters.*

Baseline shift moves text up or down from the *baseline,* or the imaginary line that the letters sit on. Baseline shift is often applied to shift bullets or parentheses so they sit better next to text. It can also be used for special effects in display or headline text 36.

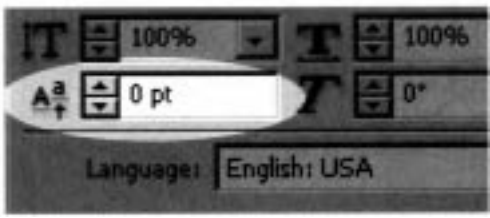
Wonderful Wizard

36 *A negative baseline shift lowers the capital letters from the rest of the characters.*

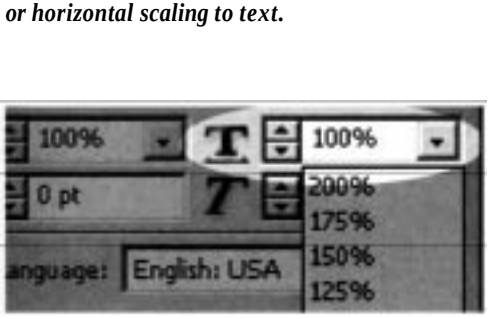
To set the baseline shift:

1. Select the text that you want to reposition.
2. Use the baseline shift controls in the Character palette to move the text away from the baseline 37.

TIP Positive numbers move the text up. Negative numbers move the text down.

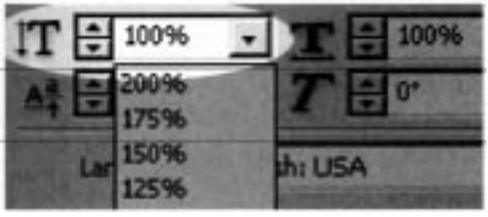


37 *The* Baseline shift controls *in the Character palette move text above or below the line.*



39 *The effects of applying either vertical scaling or horizontal scaling to text.*

40 *Use the* Horizontal scale controls *in the Character palette to distort the width of text.*



41 *The* Vertical scale controls *in the Character palette let you distort text height.*

42 *Negative and positive skew applied to create a special text effect.*

43 *The* Skew controls *in the Character palette to create fake oblique and slanted text.*

Applying Text Distortions

InDesign also lets you apply horizontal or vertical scaling to text. This distorts the text to increase its height or width 39. This changes the type from the original design of the characters. Typographic purists (such as this author) disdain distorting text.

To apply horizontal scaling:

1. Select the text that you want to distort.
2. Use the horizontal scale field controls in the Character palette to change the width of the text 40.

To apply vertical scaling:

1. Select the text that you want to distort.
2. Use the vertical scale field controls in the Character palette 40.

Skewing allows you to slant or tilt text 41. This is also called ***false italic*** because it resembles the slant of italic text.

To skew text:

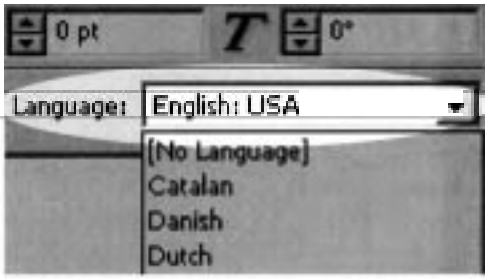
1. Select the text that you want to skew.
2. Enter an angle in the skew field in the Character palette of how much the text should be slanted 42.

TIP Positive numbers to 180 degrees tilt the text to the left. Negative numbers to 180 degrees tilt the text to the right.

Setting the Language

You can also set the language. This ensures that foreign words as well as your native language are spell-checked and hyphenated using the proper dictionary.

TIP If you have [No Language] selected, InDesign can't substitute typographer's quotes ("curly" quotes) for the ordinary typewriter quotes ("dumb" quotes).



43 *The* Language menu *lets you set the language used for spelling checks as well as for typographer quotes.*

To set the language:

1. Select the text that you want to set the language for.
2. Choose the language from the pop-up menu in the Character palette 43.

Electronic Styling: Myths and Realities

As you set type using programs such as InDesign, people may tell you *never* to style fonts electronically. So if you use the Roman version of a font (such as Minion), you should never press the keyboard shortcut for italic. You should only choose the actual typeface (Minion Italic) from the font menu.

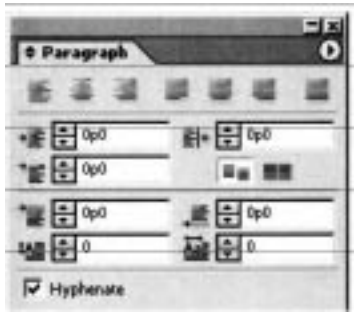
This rule emerged because some typefaces do not have an italic or bold version. The styling shows on the screen, but it doesn't print. Techno or Zapf Dingbats are examples of fonts that shouldn't be styled electronically. When people see their printed samples they're disappointed that there is no bold or italic appearance.

Fortunately, InDesign prevents you from making errors like that. If you apply the shortcut for italic, InDesign applies the actual italic version. If there is no version, InDesign does not change the font. So there is no harm styling electronically using InDesign.

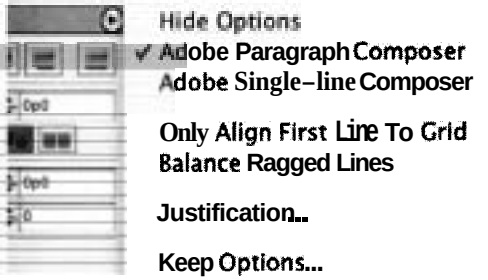
I've also heard people advise to avoid all caps, subscript, small caps, and other electronic styles on type. In most cases, there is nothing wrong with applying those styles, and InDesign allows you to apply those electronic styles to text.

In some cases you'll have better results with a small-caps version of a font than with the electronic style for small caps. However, using a special small-caps font is a nuance and few people recognize the difference. *(For an excellent discussion on how to use electronic small caps, see* The Non-Designer's Type Book *by Robin Williams, published by Peachpit Press.)*

I personally hate the electronic styling for Vertical and Horizontal Scale. They distort the type horribly. The Skew command is even worse! However, I do accept that there might be times (grotesque Halloween cards?) where those distortions are acceptable.



44 *The* Paragraph palette *controls attributes that are applied to the whole paragraph.*



45 *The* Paragraph palette menu *contains additional controls forparagraph attributes.*

Applying Paragraph Formatting

Paragraph formatting refers to the attributes that are applied to the paragraph as a whole. For instance, you cannot have half of the paragraph centered and the other half on the left size of the page. The alignment must be applied to the whole paragraph. InDesign paragraph formatting is applied using the Paragraph palette.

TIP As you work with text frames, the Control palette changes to display many of the text controls found in the Character palette. This makes it possible to style text using just the Control palette. See "Using the Control Palette for Text" at the end of this chapter for information on using it to style text.

To work with the Paragraph palette:

1. If the Paragraph palette is not visible, choose **Window** > Type > Paragraph or Type > Paragraph. This opens the Paragraph palette 44.

   or

   Click the Paragraph palette tab to move it to the front of a set of tabbed palettes.

2. To display **all** the paragraph formatting controls, choose Show Options from the Paragraph palette pop-up menu.

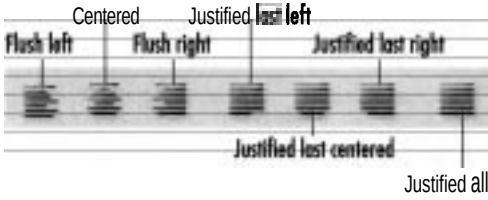
TIP The Paragraph palette menu also contains additional controls for formatting text 45. ***(See Chapter 15, "Typography Controls," for working with the Paragraph palette menu.)***

TIP The following techniques are useful when applying paragraph attributes:

- To apply attributes to a single paragraph, click to place an insertion point within the paragraph.
- To apply attributes to more than one paragraph, select a portion of the first and last paragraph and the paragraphs in between.

Setting Alignment a d Indents

In addition to the common alignment controls found in page layout or word processing, InDesign offers some special controls for setting alignment.



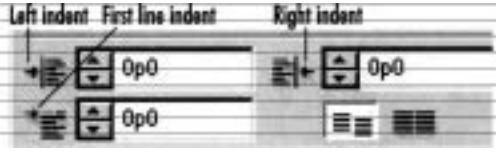
45 *The* Alignment buttons *on the Paragraph palette control how the type is aligned to the frame edges.*

To set paragraph alignment:

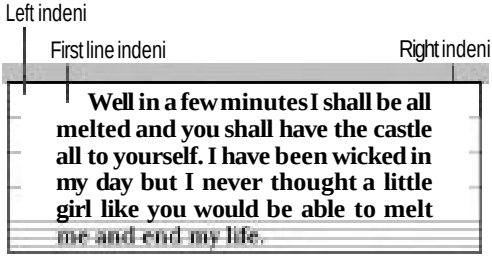
1. Select the paragraphs.
2. Click one of the seven Alignment buttons **45** to set the alignment as follows:

Alignment	Icon	Example	Description
Flush Left		Well, in a few minutes I shall be all mehed and you shall hove the castle all to yourself. I hove been wicked in my day but I never thought a little girl like you would be able to melt me.	Sets the text to align at the left margin.
Centered		Well, in a few minutes I shall be all mehed and you shall have the castle all to yourself. I have been wicked in my day but I never thought a little girl like you would be able to melt me.	Sets the text to align at the center of the paragraph.
Flush Right		Well, in a few minutes I shall be all melted and you shall have the castle all to yourself. I hove been wicked in my day but I never thought a little girl like you would be oble to melt me.	Sets the text to align at the right margin.
Justified Last Left		Well, in a few minutes I shall be all melted and you shall have the castle all to yourself. I have been wicked in my day but I never thought a little girl like you would be oble to melt me.	Sets the text to align at both the left and right margins, but aligns the last line flush left.
Justified Last Centered		Well, in a few minutes I shall be all melted and you shall have the castle all to yourself. I have been wicked in my day but I never thought o little girl like you would be able to melt me.	Sets the text to align at both the left and right margins, but centers the last line.
Justified Last Right		Well, in a few minutes I shall be all mehed and you shall have the castle all to yourself. I have been wicked in my day but I never thought a little girl like you would be oble to melt me.	Sets the text to align at both the left and right margins, but aligns the last line flush right.
Justified *All*		Well. in o few minutes I shall be all mehed and you shall hove the castle all to yourself. I hove been wicked in my day but I never thought a little girl like you would be able to melt me.	Sets all the text to align at both the left and right margins.

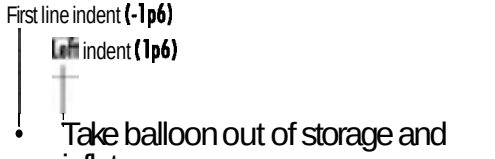
TIP Look closely and you'll see that the lines in the alignment buttons resemble how the alignment changes the position of the text.



47 *The* Margin Indents *control the amount of space around a paragraph and its first line.*



48 *The effect of applying margin indents to text inside a text frame.*



49 *The margin indent settings for a* hanging bullet. *Notice that the First Line indent has a negative value.*

Text doesn't have to completely fill the width of a text frame. You might want to indent a paragraph so that it stands out from the rest of the text. Or you might want to indent just the first line of each paragraph to make text easier to read. These looks are created by the margin indents.

To set the margin indents:

1. Select the paragraphs.
2. Use the margin indent controls 47 to move the text as follows 48:
   - Left moves the left side of the paragraph away from the left side of the text frame.
   - First Line moves the first line only of the paragraph away from the rest of the paragraph.
   - Right moves the right side of the paragraph away from the right side of the text frame.

Another look you can create is to hang elements on the first line outside the rest of the paragraph. This is the look used for numbered and bulleted lists such as the ones I've used throughout this book 49.

To create a hanging bullet or numbered list:

1. Select the paragraphs.
2. Set the Left indent to the amount that the body of the paragraph should be indent.
3. Set the First Line indent to a negative amount. This hangs the first line outside the main body of the paragraph.
4. Insert a tab character *(see page* 280) to separate the bullet or number from the rest of the first line.

TIP The order of these steps is important because the First Line indent cannot have a negative amount until the Left indent has been created.

Inserting a Manual Indent

The Indent to Here character allows you to set an indent command that is tied to the position of the character.

TIP The Indent to Here character makes it easy to set a hanging indent for a drop cap or bulleted list.

To use the Indent to Here character:

1. Click inside a text frame where you would like the indent to occur.

TIP The insertion point is placed not in the lines that you want to indent, but inside the line that serves as the model. This is usually the first line of text.

2. Type Cmd/Ctrl-\ (backslash).

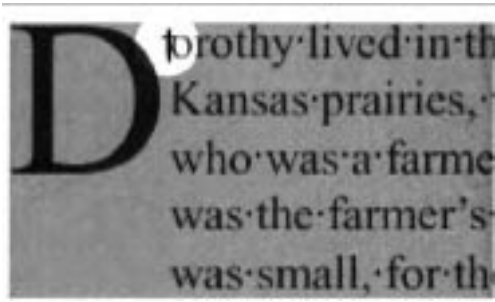
   or

   Choose Type >Special Character > Indent to Here. This inserts a character that creates an indent at that point.

TIP The Indent to Here character is indicated by a dagger symbol when the Show Hidden Characters command is chosen *(see page 66)*.

To remove the Indent to Here character:

1. Place the insertion point to the right of the Indent to Here character.
2. Press the Delete/Backspace key.



The **Indent** *to* **Here character** *is indicated by the small dagger symbol. It automatically creates a hanging indent for the drop cap.*

Pros and Cons of Indent to Here Character

When should you use the Indent to Here character? When should you use the paragraph margin indents?

The Indent to Here character is an excellent solution for setting off a drop cap. Because it is not set by a measurement, it doesn't need to be adjusted if you change the drop cap letter from a wide letter such as *M* to a thin one such as *I* or *J*.

However, the Indent to Here character is not a good solution for long documents with numbered or bulleted lists. Margin indents applied to style sheets *(see page 328)* are more useful for those situations.

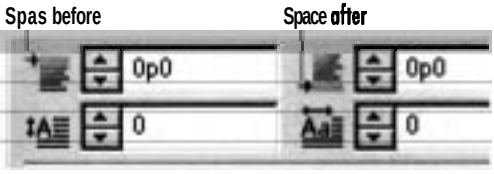
"At the East, not far from here," said one, "there is a great desert, and none could live to cross it."

Paragraph space

"It is the same at the South," said another, "for I have been there and seen it. The South is the country of the Quadlings."

I am told," said the third man, "that it is the same at the West and that country, where the Winkies live, is ruled by the Wicked Witch of the West, who would make you her slave if you passed her way."

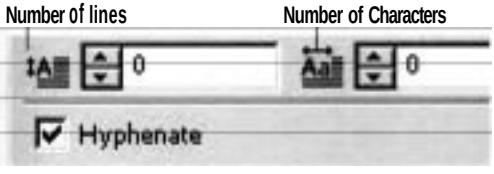
51 ***An example of adding space between paragraphs.***



52 ***Use the*** Paragraph Space controls ***to add space before or after a paragraph.***

Dorothy lived in the midst of the great Kansas prairies, with Uncle Henry, who was a fanner, and Aunt Em, who was the farmer's wife.

53 ***An example of a*** drop cap ***set for one character and three lines.***



54 ***Use the*** Drop Cap controls ***to change the appearance of a paragraph drop cap.***

Setting Paragraph Effects

The paragraph effects are available when Show Options is chosen in the Paragraph palette. One of the paragraph effects is to add space above and below a paragraph **51**. For instance, the space between this paragraph and the one following is controlled by adding space below.

To add space between paragraphs:

1. Select the paragraphs that you want to add space above or below.
2. Use the space before field controls to add space before the paragraphs **52**.
3. Use the space after field controls to add space after the paragraphs **52**.

TIP Never insert paragraph returns to add space between paragraphs. That can cause problems later if text reflows!

Drop caps increase the size of the first character or characters and positions them so that they drop down into the rest of the paragraph @. The opening page for each chapter of this book contains a paragraph that has a drop cap applied.

To create drop caps:

1. Select the paragraph you want to set with a drop cap.
2. Use the Drop Cap Number of Lines field to set the number of lines that the letter should occupy **54**.
3. Use the Drop Cap Number of Characters field to set how many characters of the text should have the drop cap applied **54**.

TIP If you want the drop cap to have a different typeface, you can select and change the letter manually. You can also use the drop cap character style controls described on page 342.

You can also control if the text within a paragraph should be hyphenated @.

To turn on hyphenation:

1. Select the paragraphs you want to set the hyphenation for.
2. To turn on hyphenation, click the Hyphenate checkbox in the Paragraph palette 55. Depending on what words are hyphenated, the text may reflow. *(See Chapter 15, "Typography Controls" for information on controlling the amount of hyphens in a paragraph.)*

The Munchkins immediately took out their handkerchiefs and began to weep.

The Munchkins immediately took out their handkerchiefs and began to weep.

55 *The effects of the* Hyphenate command *turned off (top) and turned on (bottom).*

56 *Use the* Hyphenate checkbox *to hyphenate words at the ends of lines.*

Using the Text Utilities

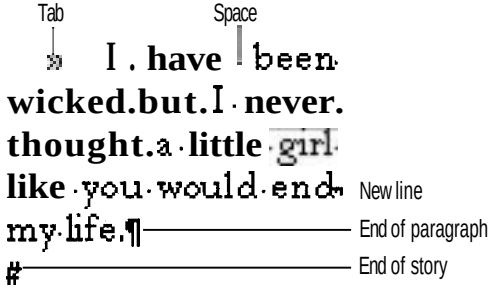
There are several utilities you can use to make it easier to work with text. For instance, you can display the hidden characters (sometimes called *invisibles*) that let you see where spaces, tab characters, and paragraph returns fall in the text.

To display hidden characters:

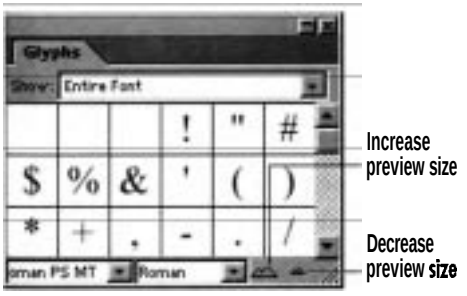
- Choose **Type** > Show **Hidden** Characters. This displays the characters in the same color as the highlight for the layer 57.

To change the colors of the hidden characters:

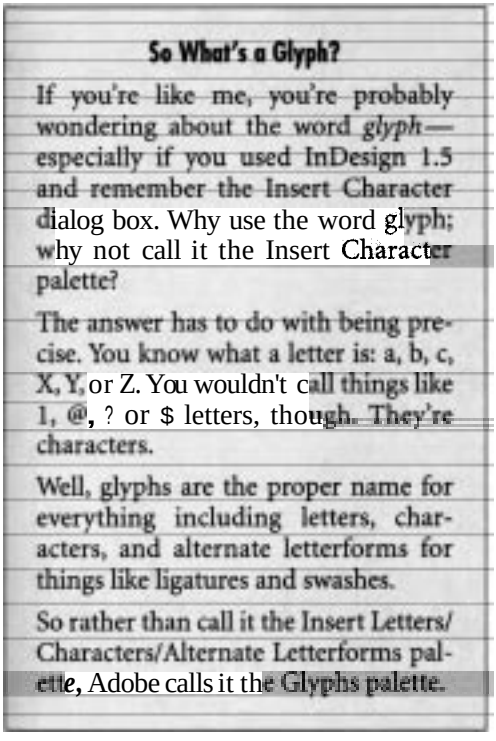
- Change the Layer color in the Layers palette *(see page 268)*.



57 *An assortment of the* hidden characters *displayed within text.*



Use the Glyphs palette *to insert characters from different fonts.*



So What's a Glyph?

If you're like me, you're probably wondering about the word *glyph*—especially if you used InDesign 1.5 and remember the Insert Character dialog box. Why use the word glyph; why not call it the Insert Character palette?

The answer has to do with being precise. You know what a letter is: a, b, c, X, Y, or Z. You wouldn't call things like 1, @, ? or $ letters, though. They're characters.

Well, glyphs are the proper name for everything including letters, characters, and alternate letterforms for things like ligatures and swashes.

So rather than call it the Insert Letters/Characters/Alternate Letterforms palette, Adobe calls it the Glyphs palette.

The Glyphs palette lets you easily see all the elements in a typeface. This includes characters that are accessed using special keystrokes. You can also use the palette to display the alternate letterforms that are part of OpenType fonts (seepage 368).

To insert characters:

1. Place the insertion point where you would like the character to be inserted.
2. Choose Type >Insert **Glyphs.** This opens the Glyphs palette 578.
3. Choose the typeface and style of the character you want to insert.
4. Scroll through the Preview area to find the character you want to insert.

TIP Use the Preview Size controls to increase or decrease the size of the preview.

5. Double-click the character you want to insert.
6. Repeat step 5 to insert any additional characters.

TIP The Glyphs palette allows you to insert characters that are not usually available for certain operating systems. For instance, Macintosh users can insert fractions and Windows users can insert ligatures.

Working with Text Flow

As mentioned earlier (see page *49*), if text overflows its text frame, you can link the text into another frame.

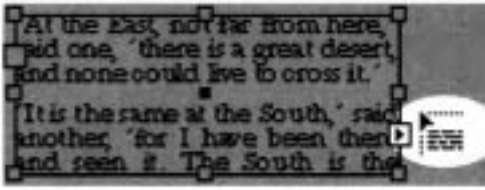
To link text between frames:

1. Click the overflow symbol. The cursor changes to the load text cursor (59).
2. Move the cursor over to the frame you want to flow the text into. The cursor changes to the link text cursor (60).

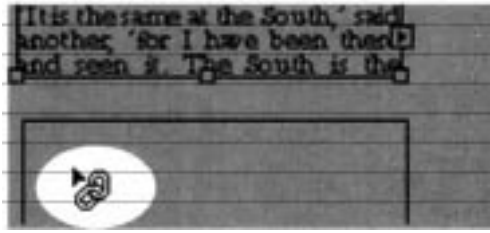
TIP Unlike QuarkXPress, the second text frame does not have to be empty.

3. Click in the text frame. The link indicators show that the text in the frame flows to or from another frame (61).

TIP You can use the same steps to link empty text frames. This makes it easy to flow text into the layout later.



(59) *The* load text cursor *indicates that you can continue the overflow text in another frame.*



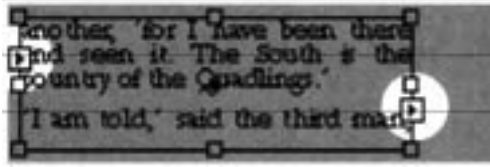
(60) *The* link text cursor *indicates you can click to fill the next frame with text.*

To change the link between frames:

1. Click the link indicator in the frame where you want to break the link. The cursor turns into a **link** text cursor.
2. Click in a new text frame to flow the text into a new frame.

   or

   Click inside the text frame to keep **all** the text within that frame. (The overflow symbol appears.)

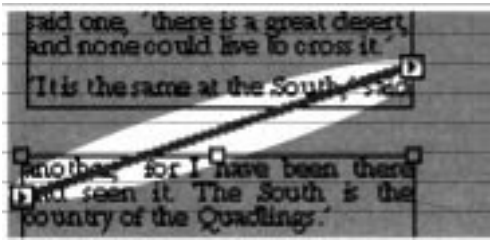


(61) *The* link indicators *show that the textflows into and out of the text frame.*

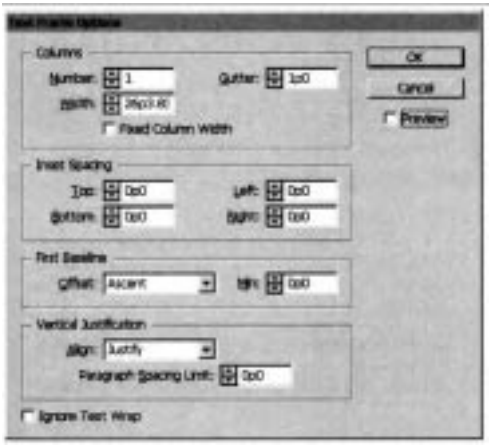
InDesign also displays text threads, which show you the links between text frames.

To show the links between frames:

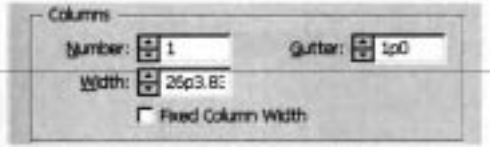
1. Select the text frame that you want to see the links for.
2. Choose View > Show **Text** Threads. This displays lines that show which frames are linked together (62).



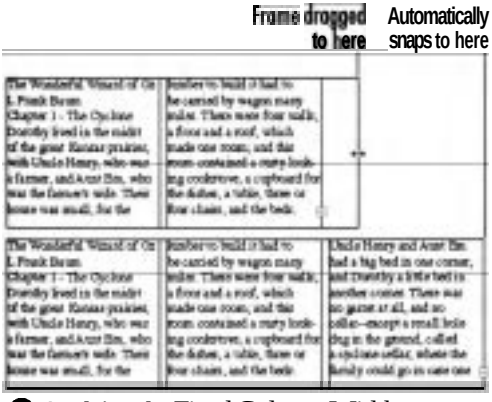
(62) *The* text threads *show the links between frames.*



63 *The* Text Frame Options dialog box *controls the flow of text within a frame.*



64 *The* Columns settings *for the Text Frame Options dialog box.*



65 *Applying the* Fixed Column Width *ensures that the columns in a text frame are always the same size.*

Setting Text Frame Controls

Once you create a text frame, you can still control the flow of text within the frame. This is similar to creating a mini-layout within the text frame.

To create text frame columns:

1. Select the text frame.
2. Choose Object >Text Frame Options. This opens the Text Frame Options dialog box 63.
3. Set the following options in the Columns areas 64:
   - Number sets the number of columns.
   - Width sets the column width of the columns.
   - Gutter controls the space between the columns.
4. Click the Preview checkbox to see the effects of the changes.
5. Click OK to apply the amounts.

InDesign also has a powerful feature that helps you maintain a fixed column width when working with a text frame. This is very helpful for magazine and newspaper layouts where all text is in the same column width.

To use the fixed column width:

1. Click Fixed Column Width in the Text Frame Options dialog box.
2. Drag to resize the frame width. The width automatically jumps to whatever size can accomodate an additional column 65.

In addition to the indents *(see page 63)* you can also add space between the text and the frame. This is called the *inset spacing.*

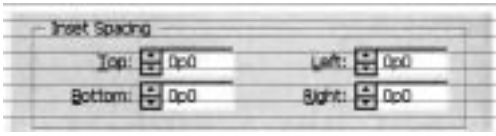
To control the frame inset:

1. Select the text frame and open the Text Frame Options dialog box
2. Enter the values in the Inset Spacing controls to control the amount of space between the top, bottom, left, and right edges of the frame 66.
3. Click the Preview checkbox to see the effects of the changes 67.
4. Click OK to apply the changes to the column.

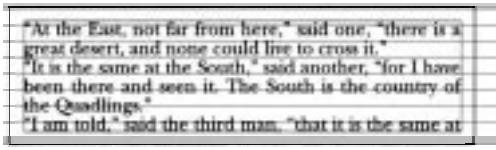
You can also control where the first baseline of the frame is positioned. (The *baseline* is the line on which the letters of the text rest.)

To control the first baseline:

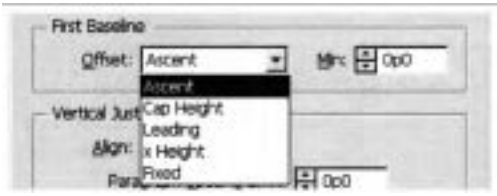
1. Select the text frame and open the Text Frame Options dialog box *(seepage 69).*
2. Choose one of the five options in the First Baseline Offset pop-up list 68:
   - Ascent positions the first baseline so that the tops of the ascending characters (such as h, t, l, and d) are at the top edge of the text frame 69.
   - Cap Height positions the first baseline so that the tops of capital letters are at the top edge of the frame 69.
   - Leading positions the first baseline from the top edge at a distance equal to the leading *(see page* 57) assigned to the text 69.
   - x Height positions the first baseline so that the top of the lower case letters (such as a, x, and c) touch the top of the frame 69.
   - Fixed allows you to set the position of the first baseline from the top edge 69.
3. If desired, set an amount in the Min field to increase the space between the baseline and the top of the frame.



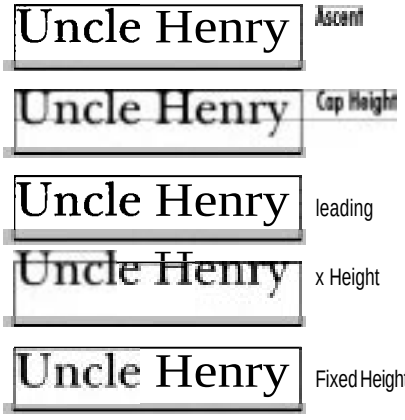
66 *The* Inset Spacing settings *for the Text Frame Options dialog box.*



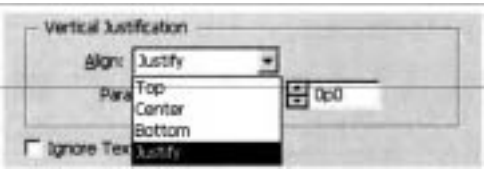
67 *A text frame with inset spacing has space between the* ***text frame*** *and the text.*



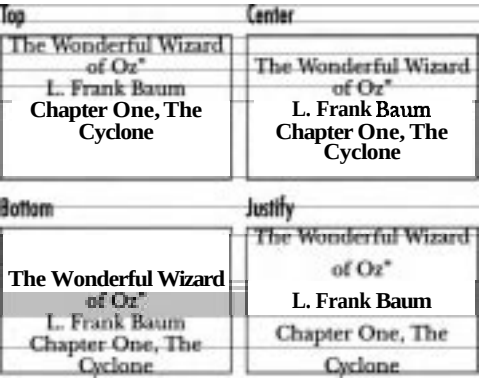
68 *The* First Baseline Offset menu *controls the position of* ***the first*** *line of text.*



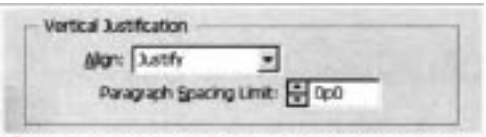
69 *Examples of the five choices for* ***the first*** *line offset settings.*



70 *The* Vertical Justification Align menu *lets you choose where text is positioned vertically.*



71 *The four* vertical alignment settings *change the position of text within a frame.*



72 *The* **Paragraph Spacing Limit** *for justified vertical alignment controls how much space will be between paragraphs before the leading is increased.*

73 *A paragraph spacing limit of 0p causes the leading to increase. A limit of 1p only adds space between the paragraphs, not the leading.*

The vertical justification of a text frame controls where the text is positioned from the top to the bottom of the frame.

To set the vertical justification:

1. Select the text frame **and** open the Text Frame Options dialog box (seepage 69).
2. Choose one of the four options in the Vertical Justification Align pop-up list **70**:
   - Top positions the text so that it sits at the top of the frame **71**.
   - Center positions the text so it is centered between the top and bottom of the frame **71**.
   - Bottom positions the text so that the last line sits at the bottom of the frame **71**.
   - Justify positions the text so that it fills the entire frame from top to bottom **71**.

When you set the vertical alignment to Justify, you can set how the space between paragraphs is applied.

To set the paragraph spacing limit:

1. Set the Vertical Justification Alignment to Justify.
2. Set an amount in the Paragraph Spacing Limit field **72**. The higher the number, the more space between paragraphs and the less likely the leading between the lines will be affected by **justifying** the text vertically.

TIP Set **an** amount equal to the height of the text frame to add space only between the paragraphs, not between the lines **73**.

Using the Control Palette for Text

As mentioned previously, the Control palette changes its settings depending on the type of objects that is selected. For example, when a text object is selected, the Control palette displays a combination of the Character and Paragraph palette controls.

To use the Control palette for Character settings:

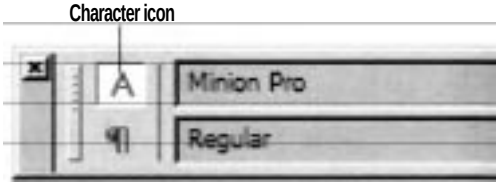
1. Use the Type tool to create an insertion point within a text frame. The Control palette displays the text options.
2. Click the Character icon to display the Character attribute settings 74.

To use the Control palette for Paragraph settings:

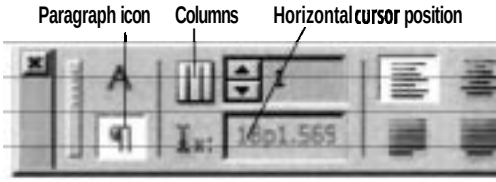
1. Use the Type tool to create an insertion point within a text frame. The Control palette displays the text options.
2. Click the Paragraph icon to display the Paragraph attribute settings 75.

TIP The Paragraph settings also let you control the number of columns in a text frame *(seepage 69 for more information on setting columns in a text frame).*

TIP Look at the Paragraph settings to see the horizontal position of the cursor in the text frame.



74 *Click the* Character icon *to display the character attributes in the Control palette.*



75 *Click the* Paragraph icon *to display the paragraph attributes in the Control palette.*

How Wide are the Spaces?

While some of the white space character widths are obvious, others need some definition.

- An *em space* is the size of the letter M at that point size. In traditional typesetting, an em space was often used as the indent for a paragraph.
- An *en space* is one-half of an em space. An en space is often used as a fixed-width space between bullets and the next character of text.
- A *thin space* is one-eighth of an em space. I use a thin space on either side of an em dash or the > sign in menu commands such as File > New.
- A *hair space* is one-twenty-fourth of an em space. A hair space is used when extremely small spaces are needed.
- A *figure space* is the width of a number in the same typeface. This is used to help align numbers in financial tables.
- A *punctuation space* is the width of a period or comma.
- A *flush space* is a variable space that is used with the Justify All paragraph alignment setting. When flush space is inserted, the space between the characters will automatically expand so that the line of text fills the entire column width. A flush space character ensures that the justification of the text comes from the word spacing and not letterspacing.

Using Special Text Characters

Text does not consist of just alphabetical characters. There are special characters and spaces that are used as part of professional typography. InDesign lets you insert those characters into your documents.

TIP See the next page for a list of the special characters and white space characters and their default keyboard shortcuts.

To insert special characters:

1. Place the insertion point where you want to insert the special character.
2. Choose Type > Insert Special Character.

   or

   Control-click (Mac) or right-mouse click (Win) and choose Insert Special Character from the contextual menu.
3. Choose a character listing from the submenu.

You can also insert white space characters, which are fixed spaces such as em and en spaces. You can also insert a nonbreaking space that forces two words to stay together.

To insert special space characters:

1. Place the insertion point where you want to insert the special character.

TIP You can highlight a regular space to replace it with a white space character.

2. Choose Type > Insert White Space.

   or

   Control-click (Mac) or right-mouse click (Win) and choose Insert White Space from the contextual menu.
3. Choose a white space character listing from the submenu.

Windows Commands

These are the default keyboard commands in Windows for the special characters and white spaces.

Insert Special Character Commands	
Auto Page Number	Ctrl+Alt+N
Bullet Character	Alt+8
Copyright Symbol	Alt+G
Discretionary Hyphen	Ctrl+Shift+-
Double Left Quotation	Alt+[
Double Right Quotation	Shift+Alt+[
Ellipsis	Alt+;
Em Dash	Shift+Alt+-
En Dash	Alt+-
Indent to Here	Ctrl+\
Next Page Number	Ctrl+Shift+Alt+]
Nonbreaking Hyphen	Ctrl+Alt+-
Paragraph Symbol	Alt+7
Previous Page Number	Ctrl+Shift+Alt+[
Registered Trademark Symbol	Alt+R
Right Indent Tab	Shift+Tab
Section Name	Ctrl+Shift+Alt+N
Section Symbol	Alt+6
Single Left Quotation	Alt+]
Single Right Quotation	Shift+Alt+]
Tab	Tab
Trademark Symbol	Alt+2

Insert White Space	
Em Space	Ctrl+Shift+M
En Space	Ctrl+Shift+N
Figure Space	Ctrl+Shift+Alt+8
Hair Space	Ctrl+Shift+Alt+I
Nonbreaking Space	Ctrl+Alt+X
Thin Space	Ctrl+Shift+Alt+M

Macintosh Commands

These are the default keyboard commands on the Mac for the special characters and white spaces.

Insert Special Character Commands	
Auto Page Number	Cmd+Opt+N
Bullet Character	Opt+8
Copyright Symbol	Opt+G
Discretionary Hyphen	Cmd+Shift+-
Double Left Quotation	Opt+[
Double Right Quotation	Opt+Shift+[
Ellipsis	Opt+;
Em Dash	Opt+Shift+-
En Dash	Opt+-
Indent to Here	Cmd+\
Next Page Number	Cmd+Opt+Shift+]
Nonbreaking Hyphen	Cmd+Opt+-
Paragraph Symbol	Opt+7
Previous Page Number	Cmd+Opt+Shift+[
Registered Trademark Symbol	Opt+R
Right Indent Tab	Shift+Tab
Section Name	Cmd+Opt+Shift+N
Section Symbol	Opt+6
Single Left Quotation	Opt+]
Single Right Quotation	Opt+Shift+]
Tab	Tab
Trademark Symbol	Opt+2

Insert White Space	
Em Space	Cmd+Shift+M
En Space	Cmd+Shift+N
Figure Space	Cmd+Opt+Shift+8
Hair Space	Cmd+Opt+Shift+I
Nonbreaking Space	Opt+Space, Cmd+Opt+X
Thin Space	Cmd+Opt+Shift+M

WORKING WITH OBJECTS 4

Back in the old days of board mechanicals, advertising agencies and design studios had a production area called the bullpen. It was the people in the bullpen—called bullpen artists—who actually created the mechanical. Most of them were kids just out of design school; the bullpen was usually their first step up the ladder in advertising or design.

The kids in the bullpen were quite amazing. Although not professional illustrators, they could create all sorts of artwork for the layout.

The same is true with InDesign. While InDesign is not a full-fledged drawing program such as Adobe Illustrator, you can use InDesign's tools to create a wide variety of effects by distorting, moving, resizing, duplicating, and aligning objects. It's your electronic bullpen.

Types of Frames

Frames are the containers in which you place graphics or text. Frames can also be used as graphic shapes. There are three types of frames you can create: unassigned, graphic, and text.

TIP There is a difference in how frames are displayed depending on if you have selected them with the Selection tool or the Direct Selection tool. See the table at the end of this chapter for a chart that shows the differences in how frames look when they are selected.

Unassigned frames

Unassigned frames are created with the Rectangle, Ellipse, and Polygon tools *(see pages 46–48)* ❶. These frames are useful to add color to your layout or a stroke around an area without inserting a graphic or text.

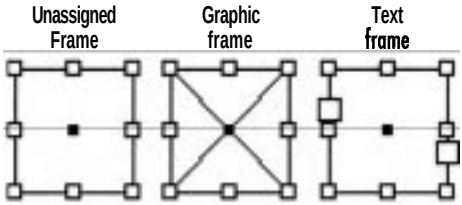
Graphic frames

Graphic frames are created with the Rectangle Frame, Ellipse Frame, and Polygon Frame tools *(see the following section).* When you create a graphic frame, diagonal lines inside the frame indicate that you can insert a graphic inside the frame ❶.

TIP Although most people insert images inside graphic frames, there is nothing to prevent you from flowing text inside a graphic frame.

Text frames

Text frames are created using the Text tool or by converting frames *(see page 48).* When you create a text frame, two link boxes appear on the sides of the frame in addition to the bounding box handles. Text frames also display a blinking insertion point when they are selected ❶.



❶ *The* three different types of frames: *unassigned, graphic, and text.*

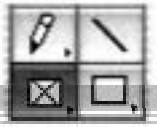
Diagonal Lines in Graphic Frames?

The diagonal lines inside a graphic frame come from a convention used in traditional pasteboard mechanicals.

When pasteboard artists drew the lines on mechanicals, they would often block off an area with diagonal lines to indicate that a picture or graphic was to go in that area.

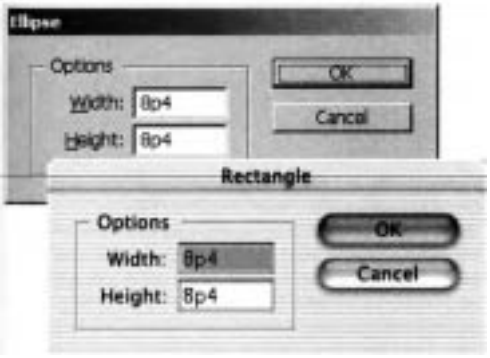
Electronic page-layout programs such as QuarkXPress and Adobe InDesign use the same convention. The diagonal lines indicate where scanned images or graphics need to be inserted.

However, there is absolutely no rule that says you can only place images in graphic frames. You can place text in graphic frames or images in unassigned frames. The choice is yours.



❷ *The* Rectangle Frame tool *in the Toolbox creates rectangular graphic frames.*

❸ *The* Ellipse Frame tool *in the Toolbox creates elliptical graphic frames.*



❹ *The* Ellipse and Rectangle dialog boxes *let* you *create frames with precise width and height.*

Creating Basic Shapes

You use the rectangle, ellipse, and polygon frame tools to create graphic frames into which you place images. You can also combine and intersect frames into other shapes using the Pathfinder palette *(see page* 163).

TIP If another tool is visible, press the corner triangle to reveal the toolset.

To create a rectangular graphic frame:

1. Click the Rectangle Frame tool in the Toolbox ❷.
2. Drag across the page to create the rectangle.

TIP Hold the Opt/Alt key to draw the object from the center.

3. Release the mouse button when the rectangle is the correct sue.

TIP Hold the Shift key to constrain the rectangle into a square.

To create an elliptical graphic frame:

1. Click the Ellipse Frame tool in the Toolbox ❸.
2. Drag across the page to create the ellipse.

TIP Hold the Opt/Alt key to draw the object from the center.

3. Release the mouse button when the ellipse is the correct size.

TIP Hold the Shift key to constrain the ellipse into a circle.

You can also create rectangles and ellipses by specifying their sue numerically.

To create objects numerically:

1. Click with either the rectangle or ellipse tools. A dialog box appears ❹.
2. Enter the width and height amounts.
3. Click OK. The object appears where the mouse was clicked.

To create a polygon graphic frame:

1. Double-click the Polygon Frame tool in the Toolbox ❾. This opens the Polygon Settings dialog box ❻.
2. Enter a number in the field for the Number of Sides in the polygon.
3. To create a star, change the amount in the Star Inset field from 0% to a higher number.

TIP A star inset of 0% creates a basic polygon. As you increase the percentage, the points of the star become more pronounced.

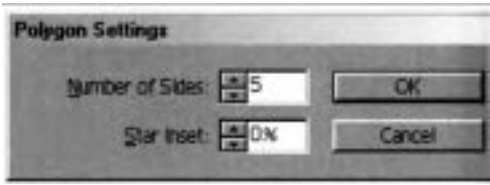
4. Drag across the page to create the polygon or star.

TIP Hold the Opt/Alt key to draw the object from the center.

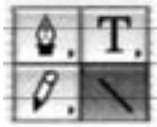
TIP Hold the Shift key to constrain the width and height of the object to the same amount.

5. Release the mouse button when the polygon or star is the correct size.

❾ *Use the* **Polygon Frame tool** *to create polygon and star graphic frames.*



❻ *The* **Polygon Settings dialog box** *creates either polygons or stars.*



❼ *The* **Line tool** *in the Toolbox creates straight lines.*

Creating Basic Shapes

InDesign is definitely the program for anyone who says they can't even draw a straight line. The Line tool makes it easy.

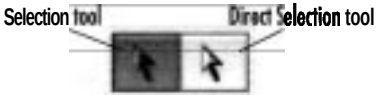
To create straight lines:

1. Click the Line tool in the Toolbox ❼.
2. Position the cursor where you want the line to start.

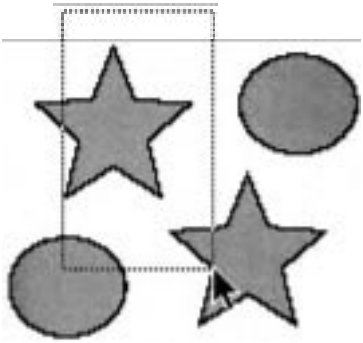
TIP Hold the Opt/Alt key to draw the line from its centerpoint.

3. Drag to create a line.
4. Release the mouse where you want the line to end.

TIP Hold the Shift key to constrain the lines to 45-degree angles.



❽ *The* Selection ***tool in the Toolbox selects entire objects. The*** Direct Selection tool ***selects a point on an object or images inside objects.***



❾ ***Drag to create a marquee to select objects.***

Selecting Objects

Once you've created objects, you can use different techniques to select them.

To select by clicking:

1. Choose the Selection tool (black arrow) in the Toolbox ❽.
2. Click the object you want to select.
3. Hold the Shift key to select any additional objects.

TIP Hold the Shift key and click on a selected object to deselect that object.

TIP To select objects behind others, hold the Command/Ctrl key as you click the mouse button.

You can also select objects by dragging an area, or ***selection marquee,*** around the object.

To select by dragging a marquee:

1. Choose the Selection tool.
2. Drag along a diagonal angle to create a marquee around the objects you want to select ❾.

TIP You do not need to marquee the entire object to select it. Objects are selected if any portion is within the marquee.

TIP Hold the Shift key and drag around another area to add to a selection.

You can also use a menu command to select all the objects on a page.

To select *all* the *objects* on a page:

- Choose Edit >Select ***All.***

TIP This command works only if you do not have an insertion point blinking inside a text frame ***(see page*** 49).

What me the *differences* between the selection tools

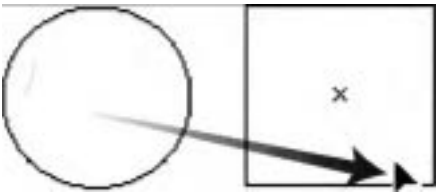
Perhaps the most confusing part of InDesign is the difference between the Selection tool (black arrow) and the Direct Selection tool (white arrow) ❽.

If you are familiar with QuarkXpress, you can think of the Selection tool as the *Object* tool. It will always select the object as a whole. Use this tool when you want to manipulate the entire object.

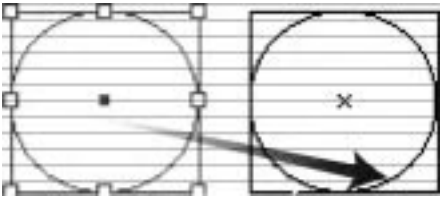
Think of the Direct Selection tool as the *Content* tool. It selects the points that make up a frame or the image that is pasted inside a frame. Use this tool when you want to select inside a frame. For more information on working with the Direct Selection tool, see page 108.

Moving Objects

The simplest way to position an object on a page is to drag it to a new position, but you can also move objects by using menu and keyboard commands, or by typing specific numerical locations into a dialog box, as you'll learn later in this chapter.



❿ *Quickly drag to see a bounding box of the object being moved.*



⓫ *Pause before you drag to see a preview of the object being moved.*

To move an object by dragging:

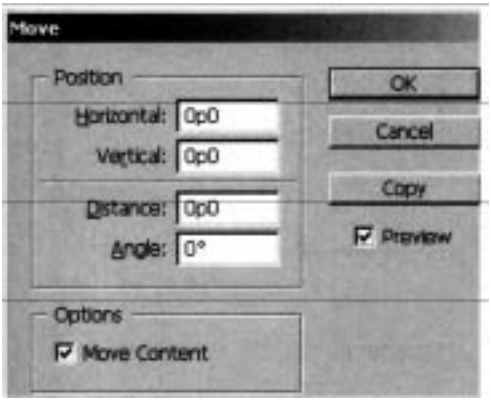
1. Choose the Selection tool in the Toolbox.
2. Click the object you want to move. A bounding box with eight handles appears around the object. This indicates the object is selected.
3. Position the Selection tool on the edges of the bounding box (but not the handles of the bounding box).

TIP If an object has a fill color, gradient, or image inside it, you can drag with the Selection tool directly inside the object. Otherwise, you must drag by the stroke or bounding box.

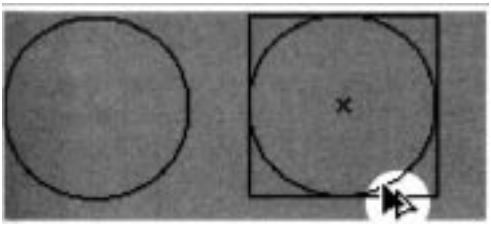
4. Drag to move the object. If you drag quickly, you will see only a bounding box preview of the object being moved ❿.

   or

   Press and pause for a moment before you drag the object. The pause lets you see a preview of the actual object as you move it ⓫.



⓬ *The* Move dialog box *gives you numerical controls for moving objects.*



⓭ *The* double-headed arrow *indicates that a copy is being created of the moved object.*

You can also move an object more precisely. One way to do this is with the Move command in the Transform menu.

To use the Move command:

1. Select the object or objects.
2. Choose Object >Transform >Move. This opens the Move dialog box ⓬.

TIP This command is also available in a contextual menu (see page 16).

TIP Click the Preview checkbox to see the results of your actions as you enter numbers in the dialog box.

3. Use the Horizontal and Vertical fields to move the object along those axes.
4. Use the Distance field to move the object an absolute distance.
5. Use the Angle field to set the angle along which the object moves.
6. Check Move Content to also move any placed graphics.
7. Click OK to move the original object.

   or

   Click Copy to create a duplicate of the object in the new position.

To copy an object as you drag:

1. Hold the Opt/Alt key before you start the move.
2. Move the object as described on the opposite page. A double-headed arrow indicates that a copy is being created ⓭.
3. Release the mouse button. The copy will appear in the new position.

Replicating Objects

There are several commands you can use to create duplicates of objects. Use the Copy command when you want to put the object on the clipboard (see page 52) so you can paste it somewhere else.

To copy objects:

1. Select an object to copy.
2. Choose Edit >Copy.

Use the Cut command to remove the object from the page so it can be pasted elsewhere.

To cut objects:

1. Select an object to cut.
2. Choose Edit >Cut.

Use the Paste command to see the contents of the clipboard.

To paste objects:

- Choose Edit >Paste. The contents of the clipboard appear in the center of the window area ⓮.

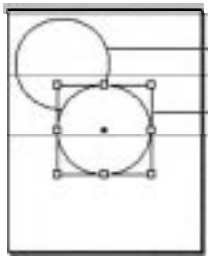
  or

  Choose Edit >Paste In Place. The contents of the clipboard appear in the same location as they were when originally selected.

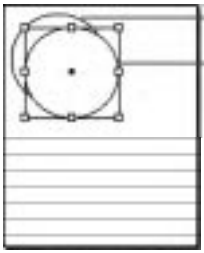
The Duplicate command makes a copy without changing the contents of the clipboard.

To duplicate objects:

1. Choose the object to duplicate.
2. Choose Edit >Duplicate. The selected object appears on the page slightly offset from the original ⓯.



⓮ ***The* Paste command *places the object in the center of the page.***



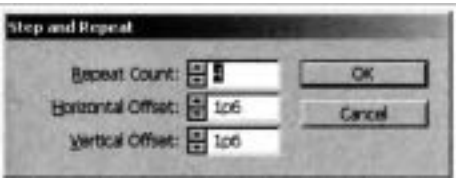
⓯ ***The* Duplicate command *places the object slightly offset from the original.***

Using Paste in Place

I always wondered just how useful the Paste in Place command is. After all, if you already have a copy of an object in one place, why would you need a second copy right over it?

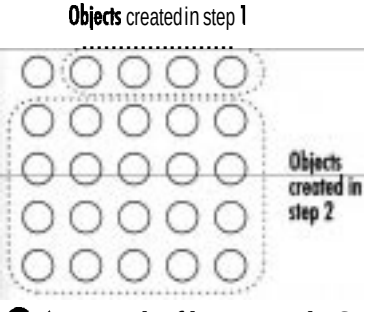
That's not the point of Paste in Place. The power of the command is that you can paste an object in the same place on different pages. You can even paste in the same place on different documents.

PageMaker users will recognize this as the Powerpaste command. QuarkXPress users will wonder how they ever got along without it.



16 *Use the* **Step and Repeat dialog box** *to make multiple copies of an objectpositioned at specific horizontal and vertical intervals.*

17 *The Step and Repeat command createdfive copies of the first circle.*



18 *An example of how to use the Step and Repeat command to create a grid of objects.*

You can also duplicate many objects at once.

To duplicate multiple objects:

1. Choose an object.
2. Choose Edit >Step **and** Repeat. The Step and Repeat dialog box appears **16**.
3. In the Repeat Count field, enter the number of duplicates that you want to create in the top row.
4. In the Horizontal Offset field, enter a distance for the horizontal space between duplicates.
5. In the Vertical Offset field, enter a distance for the vertical space between duplicates.

TIP If you want space between the objects, make the offset at least the width or height of the object plus the amount of space between the objects.

6. Click OK. The selected object is duplicated in the desired positions **17**.

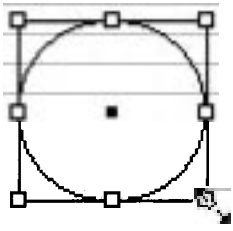
You might want to duplicate objects so they form a horizontal and vertical grid. Although the Step and Repeat command can't do this in one step, you can use the command to create a grid **18**.

To create a grid of objects:

1. Set the Step and Repeat dialog box as follows:
   - In the Repeat Count field, enter the number of duplicates for the top row.
   - Enter the distance for the Horizontal Offset.
   - Leave the Vertical Offset as zero.
2. Select all the objects in the row, and set the Step and Repeat dialog box as follows:
   - In the Repeat Count field, enter the number for the additional rows.
   - Leave the Horizontal Offset as zero.
   - Enter a distance for the Vertical Offset.

Resizing Objects

Very often things need to be made bigger or smaller. InDesign gives you several different ways to scale objects. You can also use the bounding box handles to change the dimensions of the object visually. This is the easiest way to quickly resize an object.



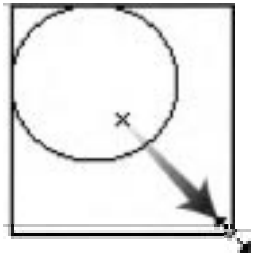
19 *Use the bounding box handles to resize an object.*

To resize using the bounding box handles:

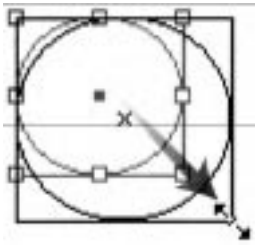
1. Choose the Selection tool.
2. Choose which handle to drag based on the following options **19**:
   - Drag the corner handles to change both the width and height.
   - Drag the top or bottom handles to change the height only.
   - Drag the left or right handles to change the width only.
3. Drag the handle. If you drag quickly, you will see only the bounding box of the object **20**.

   or

   Press and hold for a moment and then drag the handle. This shows a preview of the object as you resize the bounding box **21**.



20 *If you drag quickly, you only see a box as you resize an object.*



21 *If you press and pause a moment, you see an actual preview as you resize an object.*

TIP Hold down the Shift key as you drag a corner to keep the original proportions of the width and height.

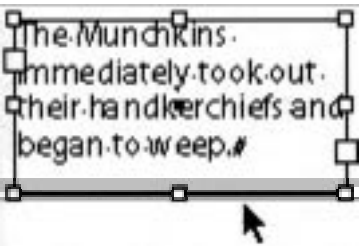
TIP Hold the Cmd/Ctrl key as you drag to resize any images placed inside the object (see *page* 182).

4. Release the mouse button when the object is the correct size.

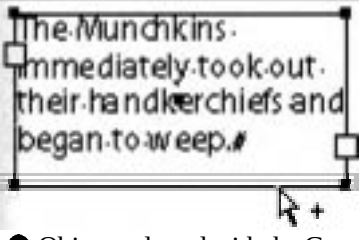
Resizing or Scaling?

While you and I might feel the words are the same, InDesign treats them differently. When you *resize* an object, you change its width or height. The amount of scaling stays the same in the Control Palette or Transform palette. You have to resize the object again to get it back to its original size.

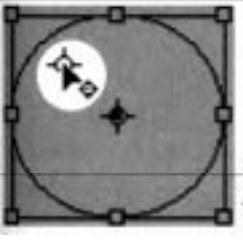
When you *scale* an object, the width and height change, and the amount of scaling applied to the object is shown in the Scale fields in the Control palette or Transform palette. You can convert the object back to its original size by setting the scaling to 100%.



22 Objects selected with the Selection tool ***have both the object and its content transformed by the transform tools.***



23 Objects selected with the Group Selection tool ***have only the object transformed by the transform tools.***



24 ***The indicator that the transformation*** *point can be moved to a new position.*

Using the Transform Tools

The Transform tools **resize** and distort objects. You can transform the object itself or the object as well as any content. How you select objects changes the effect of the transform tools.

To control the effect of the transform tools:

- Select the object using the Selection tool. This type of selection causes the transform tools to affect both the object and any text or images inside it **22**.

  or

  Hold the **Opt/Alt** key as you click the frame with the Direct Selection tool. This causes the transformation to affect only the object, not any text or images inside the object **23**.

TIP The plus (+) sign next to the Direct Selection tool indicates that the tool is the Group Selection tool.

All the transformations take place in relation to a transformation point. Each object has a default transformation point, but you can change it if necessary.

To control the transformation point:

1. Select the **object** to be transformed.
2. Choose one of the transform tools. A transform point appears inside the object.
3. Move the cursor near the transform point. A small icon appears next to the cursor that indicates you can move the transform point **24**.
4. Drag the transformation point to a new position.

   or

   Click to position the transformation point in a new position.

The Scale tool lets you increase or decrease the size of objects.

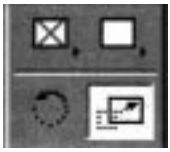
To scale objects visually using the Scale tool:

1. Select the object or objects.
2. Choose the Scale tool in the Toolbox (25).
3. If necessary, change the position of the transformation point *(see previous page)*.
4. Move the cursor away from the transformation point, and drag to scale the object (26).

TIP Hold down the Shift key to constrain the tool to horizontal, vertical, or proportional scaling.

TIP To see a preview of the image as you scale, press and hold the mouse button for a moment before you start to drag.

TIP Hold down the Opt/Alt key to copy the object as you scale it.



(25) *The* Scale tool *in the Toolbox is used to change the size of objects.*

(26) *The* arrowhead *appears while scaling an object.*

If you prefer, you can enter the resize objects numerically using the scale command.

To scale objects using the Scale command:

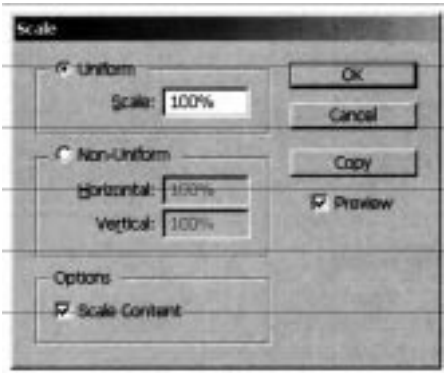
1. Select the object or objects.
2. Choose Object > Transform > Scale. This opens the Scale dialog box (27).
3. Use the Uniform Scale field to scale the object proportionally.

   or

   Use the Non-Uniform Horizontal and Vertical fields to scale the object non-proportionally.
4. Check Scale Content to also scale any graphics that are placed inside it *(see Chapter 8, "Imported Graphics")* (28).
5. Click *OK* to scale the object.

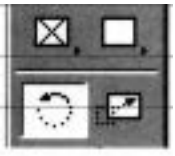
   or

   Click Copy to create a scaled copy of the object.

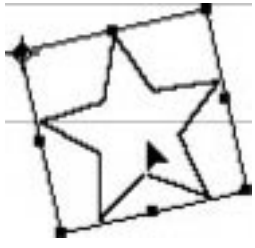


(27) *The* Scale dialog *box lets you scale objects using numerical values.*

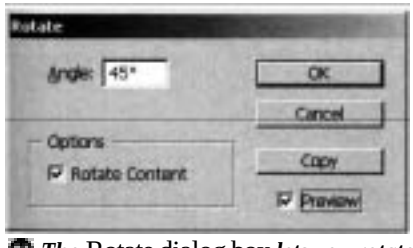
(28) *When* Scale Content is turned on, *the placed image scales along with the frame.*



39 ***The*** Rotate tool ***in the Toolbox is used to change the orientation of objects.***



40 Rotating an object ***around its transformation point.***



41 ***The*** Rotate dialog box ***lets you rotate objects using numerical values.***

Rotate content on **Rotate** content off

42 ***When*** Rotate Content is turned on, ***the placed image rotates along with the frame.***

To scale objects numerically using the Scale tool:

1. Select the object or objects.
2. Choose the Scale tool in the Toolbox.
3. Hold the Opt/Alt key and click to designate the position of the transformation point. This opens the Scale dialog box **43**.
4. Set the dialog box controls as described in the previous exercise.

The Rotation tool changes the orientation, or angle, of the object on the page.

To rotate objects visually using the Rotation tool:

1. Select the object or objects.
2. Click the Rotation tool in the Toolbox **39**.
3. If necessary, change the default transformation point *(see page* 85).
4. Move the cursor away from the transformation point, and drag to rotate the object **40**.

TIP Hold down the Shift key to constrain the rotation to 45-degree increments.

TIP Hold down the Opt/Alt key ***after*** you start the rotation to copy as you rotate.

To rotate objects using the rotate command:

1. Select the object or objects.
2. Choose Object >Transform >Rotate. This opens the Rotate dialog box **41**.
3. Use the Angle field to set how much the object should rotate.
4. Check Rotate Content to also rotate any graphics placed inside the object **42**.
5. Click OK to rotate the object.

   or

   Click Copy to create a copy as you rotate the object.

To rotate objects numerically using the Rotate tool:

1. Select the object or objects.
2. Choose the Rotate tool in the Toolbox.
3. Hold the Opt/Alt key and click to set the position of the transformation point. This opens the Rotate dialog box 31.
4. Set the dialog box controls as described in the previous exercise.

The Shear tool distorts the shape of objects.

To shear objects visually using the Shear tool:

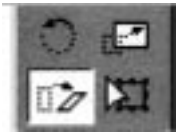
1. Select the object or objects.
2. Click the Shear tool in the Toolbox 33.
3. If necessary, change the transformation point by dragging it to a new position *(see page 85)*. The cursor indicates the transformation point can be moved.
4. Move the cursor away from the transformation point, and drag to shear the object Q.

To shear objects using the shear command:

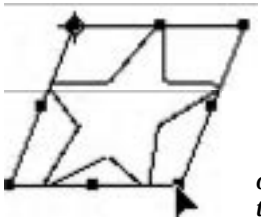
1. Select the object or objects.
2. Choose Object >Transform >Shear. This opens the Shear dialog box 35.
3. Use the Shear Angle field to set the amount of distortion.
4. Check one of the Axis options:
   - Horizontal shears along the horizontal axis.
   - Vertical shears along the vertical axis.
   - Angle shears along a specific angle.
5. Check Shear Content to also distort any graphics placed inside the object 36.
6. Click OK to shear the object.

   or

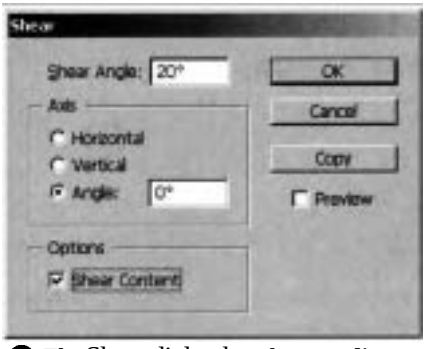
   Click Copy to create a sheared copy of the object.



33 *Use the* Shear *tool in the Toolbox to distort objects.*

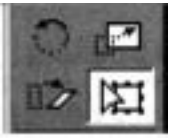


Shearing an object around the transformation point.

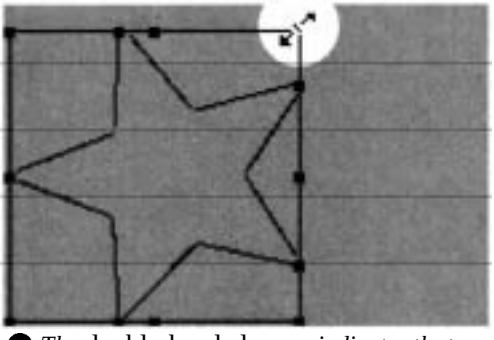


35 *The* Shear dialog box *lets you distort objects using numerical values.*

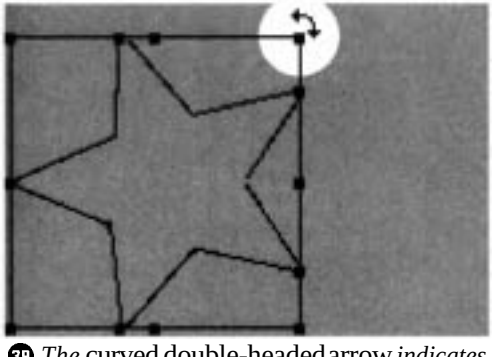
36 *The difference between shearing an object with Shear content on and off:*



37 *Choose the* Free Transform tool *in the Toolbox to both scale and rotate objects.*



38 *The* double-headed arrow *indicates that the Free Transform tool is in the scale mode.*



39 *The* curved double-headed arrow *indicates that the Free Transform tool is in the rotation mode.*

To shear objects numerically using the Shear tool:

1. Select the object or objects.
2. Choose the Shear tool in the Toolbox.
3. Hold the Opt/Alt key and click to set the position of the transformation point. This opens the Shear dialog box 35.
4. Set the dialog box controls as described in the previous exercise.

Rather than switching between the Scale and Rotate tools, you can use the Free Transform tool to both scale and rotate.

To scale using the Free Transform tool:

1. Select the object or objects.
2. Click the Free Transform tool in the Toolbox 37. A bounding box appears around the object.
3. Place the cursor on one of the handles of the bounding box. The cursor changes to a double-headed arrow 38.
4. Drag to increase or decrease the size of the object.

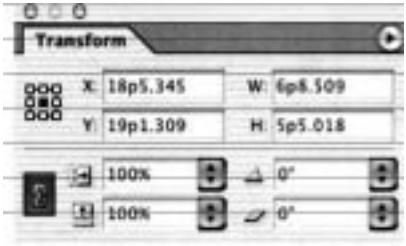
To rotate using the Free Transform tool:

1. Select the object or objects.
2. Click the Free Transform tool in the Toolbox 37. A bounding box appears around the object.
3. Place the cursor outside one of the handles of the bounding box. The cursor changes to a curved double-headed arrow 39.
4. Drag to rotate the object clockwise or counter-clockwise.

Using the Transform Palette

The Transform palette allows you to move, scale, rotate, and shear objects precisely, using numerical values.

TIP When you have objects selected, the Control palette displays many of the controls that are found in the Transform palette. (See the section "Using the Control Palette with Objects" on page 103.)



40 The Transform palette is a command center for positioning and transforming objects.

To open the Transform palette:

- Choose Window > Transform to open the palette 40.

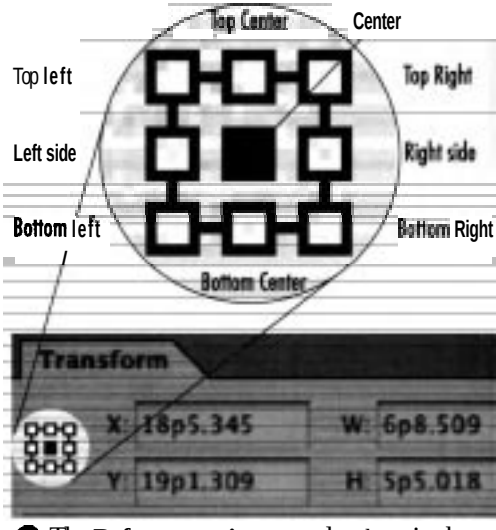
  or

  If the Transform palette is behind other palettes, click the Transform palette tab.

As you work with the Transform palette, it is important to know its reference point on the object. This is the same as the transformation point used with the transformation tools.

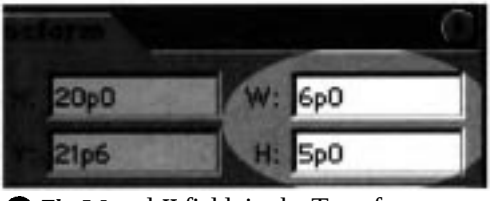
To set the Transform palette reference point:

1. Select the object or objects that you want to transform.
2. Click the reference point control on the Transform palette to choose the point around which the object moves 41.



41 The **Reference point** controls where in the object the transformation occurs.

42 *The X* and *Y* fields in the Transform palette *control the position of an object.*



43 *The W* and *H* fields in the Transform palette *control the width and height of objects.*

You can use the Transform palette to move objects numerically.

To move an object with the Transform palette:

1. Select the object or objects that you want to move.
2. To move the object horizontally, enter an amount in the X field 42.

TIP As you increase the numbers, the object moves to the right.

3. To move the object vertically, enter an amount in the Y field 42.

TIP As you increase the numbers, the object moves down.

4. Press Enter or Return to apply the changes.

You can use the Transform palette to **resize** an object numerically. This does not change the scaling amount applied to the object.

To resize with the Transform palette:

1. Select the object or objects.
2. If necessary, change the reference point as explained on the preceding page.
3. To change the width of the object, enter an amount in the W field 43.
4. To change the height of the object, enter an amount in the H field 43.
5. Press Enter or Return to **resize** the object.

You can **resize** proportionally even if you know the size for only one side of the object.

To resize proportionally:

1. Select the object or objects.
2. Enter the new size in the W field or H field 43.
3. Do not change the amount in the other field.
4. Hold Cmd/Ctrl as you press Enter or Return. The amount in both the W and H fields changes proportionally.

You can also scale objects using the Transform palette.

To scale with the Transform palette:

1. Select the object or objects.

TIP Use the Selection tool to scale the object and its contents. Use the Direct Selection tool to scale only the object.

2. If necessary, change the reference point as explained on the preceding page.
3. To change the horizontal size, enter a percentage in the scale X field (44).
4. To change the height of the object, enter a percentage in the scale Y field (44).

TIP The scale X and Y fields also have pop-up lists from which to choose the amount of scaling.

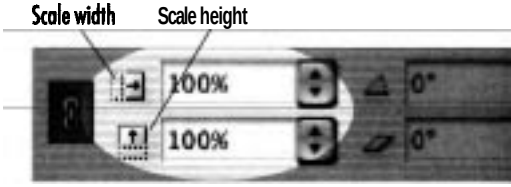
5. Press Enter or Return to apply the changes (45).

TIP You can also scale text within a text frame by dragging on the edge of the frame while holding the Cmd/Ctrl key. Hold Cmd/Ctrl-Shift and drag by a corner point to scale proportionally. This also applies to text frames in groups.

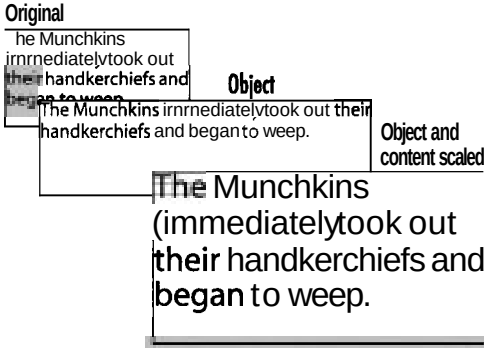
To scale proportionally with the Transform palette:

1. Select an object or objects.
2. If the Link icon is in the open state, click to close it (46).
3. Enter an amount in either the scale X or scale Y fields. You do not have to enter an amount in both fields. The closed Link icon forces both fields to display the same amount.
4. Press Enter or Return to apply the changes.

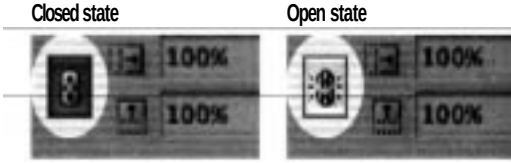
TIP Hold the Cmd/Ctrl key as you press the Enter or Return key to scale proportionally even if the Link icon is in the open state.



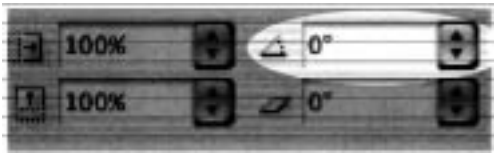
(44) ***The*** Scale width and height fields in the Transform palette ***let you apply percentage amounts to scale objects.***



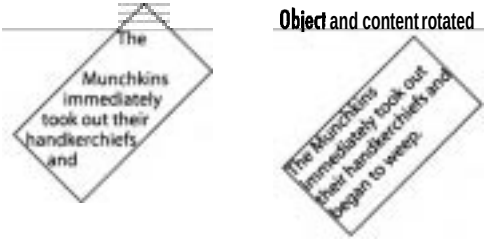
(45) ***The difference between scaling an object or scaling an object and its content.***



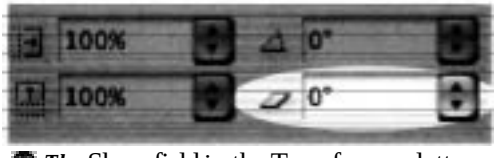
(46) ***The*** Link icon ***in the closed state forces both the Scale X and the Scale Yfields to the same amount. In the open state, you can enter different amounts for the Scale X and Scale Y fields.***



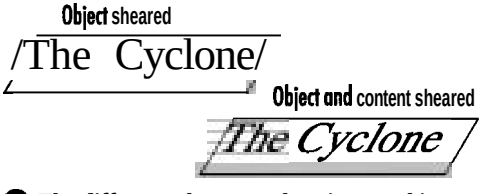
47 *The* Rotate field in the Transform palette *lets you change the angle of objects.*



48 *The difference between rotating an object or rotating an object and its content.*



49 *The* Shear field in the Transform palette *lets you distort the shape of objects.*



50 *The difference between shearing an object or shearing an object and its content.*

You can also rotate objects using the Transform palette.

To rotate with the Transform palette:

1. Select the object or objects.

TIP Use the Selection tool to rotate the object and its contents. Use the Direct Selection tool to rotate only the object. (See ***page*** 79 ***for more information on selecting objects.)***

2. If necessary, change the transformation point, as explained on page 85.
3. Enter the amount of rotation in the rotation field 47.

TIP The rotation field also has a pop-up list from which to choose the amount of rotation.

4. Press Enter or Return to apply the changes 48.

You can also shear objects using the Transform palette.

To shear with the Transform palette:

1. Select the object or objects.

TIP Use the Selection tool to shear the object and its contents. Use the Direct Selection tool to shear only the object.

2. If necessary, change the transformation point, as explained on pages 85.
3. Enter the amount of distortion in the shear field 49.

TIP The shear field also has a pop-up list from which to choose the amount of shearing.

4. Press Enter or Return to apply the changes 50.

Using the Transform Palette Menu

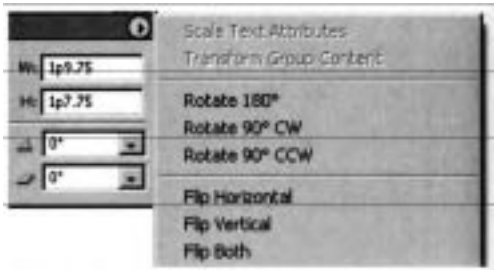
The Transform palette menu also gives you commands that make it easy to perform commonly used transformations, such as rotating and flipping objects.

To rotate with the Transform palette menu:

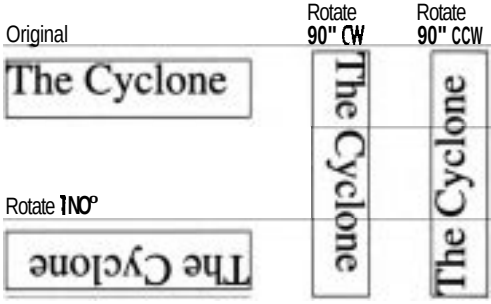
1. Select an object or objects.
2. Click to open the Transformation palette menu **Q.**
3. Choose one of the rotation settings as follows 52:
   - Rotate **180°.**
   - Rotate **90°** CW (clockwise).
   - Rotate **90°** CCW (counter-clockwise).

To flip objects using the Transform palette menu:

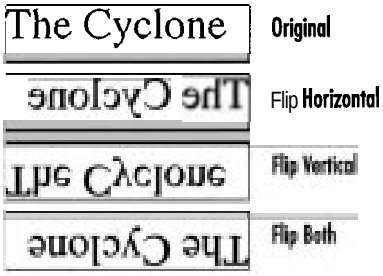
1. Select an object or objects.
2. Click to open the Transformation palette menu **Q.**
3. Choose one of the flip settings as follows 53:
   - **Flip** Horizontal.
   - **Flip** Vertical.
   - **Flip** Both.



51 *The* **rotate and flip commands** *in the Transform palette menu.*

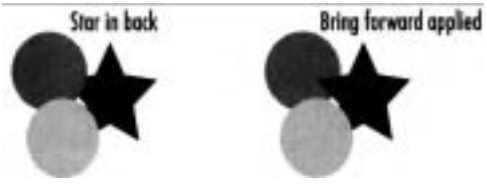


52 **The effects of rotating objects using the Transform submenu.**

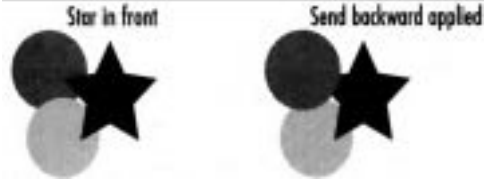


53 **The effects of flipping objects using the Transform submenu.**

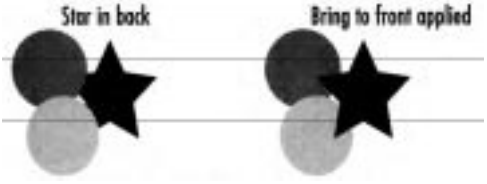
54 *When two objects overlap, it is obvious which object is in front of the other..*



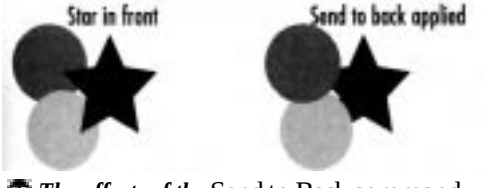
55 ***The effects of the*** Bring Forward command.



56 ***The effects of the*** Send Backward command.



57 ***The effects of the*** Bring to Front command.



58 ***The effects of the*** Send to Back command.

Using the Arrange Commands

Objects in InDesign are layered on top of one other in the same order they were created. (This is sometimes called the ***stacking order.)*** The first object created is behind the second, the second behind the third, and so on. Though you may not see the layering when objects are side by side, it is apparent when they overlap 54.

TIP The layering of objects is not the same as the layers of a document. ***(See Chapter*** 11, ***"Layers" for more information on working with layers.)***

The Arrange commands allow you to move objects through the stacking order.

To move up or down one level in a stack:

1. Select the object you want to move.
2. Choose Object >Arrange **>Bring** Forward to move the object in front of the next object in the stacking order 55.

   or

   Choose **Object** >Arrange >Send Backward to move the object behind the next object in the stacking order 56.

To move up or down the entire stack:

1. Select an object you want to move.
2. Choose Object >Arrange >Bring to Front to move the object in front of all the others in its layer 57.

   or

   Choose Object >Arrange >Send to Back to move the object behind all the others in its layer 58.

Aligning Objects

The Align palette provides commands that align objects or distribute them evenly along a horizontal or vertical axis.

To work with the Align palette:

1. Choose Window>Align. This opens the Align palette (59).

   or

   If the Align palette is behind other palettes, click the Align palette tab.

2. Choose Show Options from the Align palette menu to see all the commands in the palette.

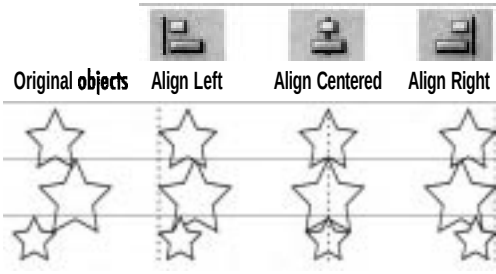
To align objects:

1. Select two or more objects.
2. Click an alignment icon as follows:
   - Click a vertical alignment icon to move the objects into left, centered, or right alignment (60).
   - Click a horizontal alignment icon to move the objects into top, centered, or bottom alignment (61).

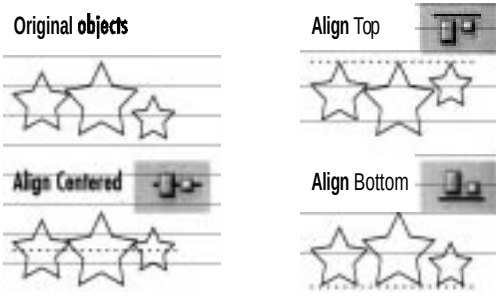
TIP The align commands move objects based on the best representation of the controls. For instance, the Align Left command uses the left-most object; Align Top uses the top-most object, and so on.

TIP You can use the Lock command to force one object to be the reference object for others *(see the sidebar on page 98)*.

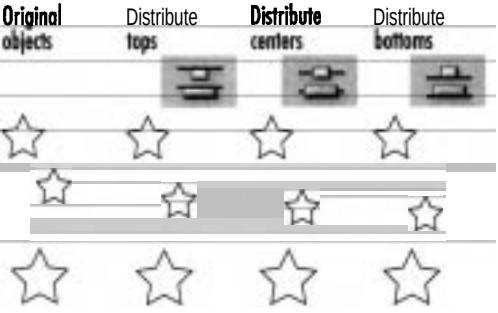
(59) *Use the* **Align palette** *to arrange objects in an orderly fashion.*



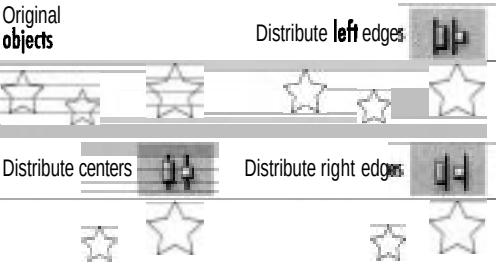
(60) *The effects of the* **vertical align commands.**



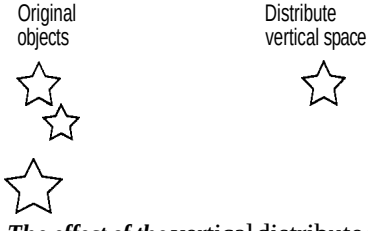
(61) *The effects of the* **horizontal align commands.**



62 ***The effects of the*** vertical distribute commands. ***Notice that the middle object changes position to create an even distribution.***



63 ***The effects of the*** horizontal distribute commands. ***Notice that the middle object changes position to create an even distribution.***



64 ***The effect of the*** vertical distribute space command.

65 ***The effect of the*** horizontal distribute space commands.

You can also move objects so the spaces between certain points of the objects are equal. This is called ***distributing*** objects.

To distribute objects:

1. Select three or more objects.
2. Click a distribute icon as follows:
   - Click a vertical distribute icon to move the objects so that their tops, centers, or bottoms are equally distributed 62.
   - Click a horizontal distribute icon to move the objects so that their left edges, centers, or right edges are equally distributed 63.

You can also distribute objects based on their size. This ensures that the space between the objects is equal.

To distribute the space between objects:

1. Select three or more objects.
2. Click a distribute space icon as follows:
   - Click the vertical space icon to move objects so the vertical spaces between them are equal 64.
     Click the horizontal space icon to move objects so the horizontal spaces between them are equal 65.

Of course, you can also move the pasted-in content along with the container.

To move the pasted-in content and the container:

1. Click with the Selection tool to select both the container and the pasted-in content.
2. Drag the objects to a new position.

Finally, you may want to remove the content within a container or swap one pasted-in content for another.

To remove a pasted-in content:

1. Use the Direct Selection tool to select the pasted-in content.
2. Choose Edit >Cut.

TIP The pasted-in content can be placed back on the page by choosing Edit >Paste.

To swap one pasted-in content for another:

1. Position the new object over the frame.
2. Choose Edit >Cut.
3. Select just the frame that holds the pasted-in content.
4. Choose Edit >Paste Into. The object on the clipboard replaces the content within the frame.

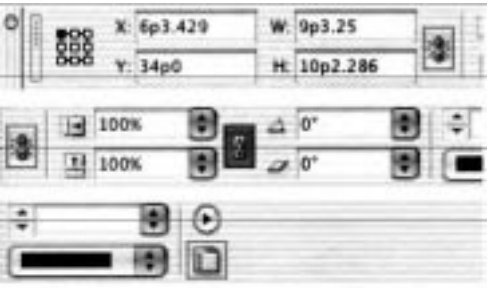
Why Use Groups?

The concept of groups comes from illustration programs. In those programs you might have an illustration that contains hundreds, if not thousands, of individual objects. It would be cumbersome to have to select those objects individually to move or modify the artwork. That's why groups were created—to make it easier to quickly select all the individual elements in artwork.

Page layout programs rarely deal with that many objects on a page. So why is it important to group objects?

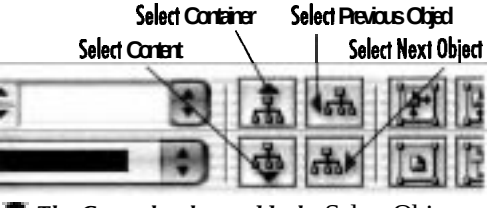
I use groups for the illustrations and captions that appear in this book. By grouping the objects together, I know the artwork won't inadvertently get separated from the captions that describe it.

I also need to group them when I appy the Distribute Space command. This way the illustration and caption are treated as one object to be separated from the other illustrations on the page.



76 ***The Control palette displays the*** basic Transform (top two) and Stroke palette options (bottom) ***when a single object is selected.***

77 ***The Control palette adds the*** basic Align palette options ***when multiple objects are selected.***



78 ***The Control palette adds the*** Select Object options ***when groups or containers or content objects are selected.***

Using the Control Palette for Objects

The Control palette is context sensitive. This means it displays different commands depending on the number of objects or if they are grouped or pasted-in objects.

To use the Control palette with a single object:

- Select a single object. The Control palette displays the basic Transform palette and stroke options **76**. ***(See Chapter 6, "Styling Objects" for more information on working with strokes.)***

To use the Control palette with multiple objects:

- Select multiple objects. The Control palette displays icons for the basic Align palette options in addition to the Transform palette options **77**.

To use the Control palette with grouped or pasted-in objects:

- Select grouped or pasted-in objects. The Control palette displays icons for the Select commands to the Transform palette options **78**.

TIP These Select commands can also be used with placed images ***(see Chapter 8, "Imported Graphics").***

TIP The Control palette also displays the Fitting commands ***(covered on page 191).***

Using the Measurement Tool

There are many places where you can find the numerical sizes of items. You can use the rulers; you can place guides; you can look at the Control palette; and so on. But what if you want to measure the distance of one point in an object to a different point in another? That's where the Measurement tool is so helpful.

79 *The* Measurement tool *in the Toolbox.*

80 *Drag the Measurement tool to measure the distance between two points.*

To measure distances using the Measurement tool:

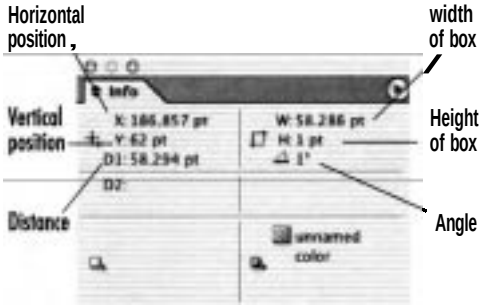
1. Choose Window > Info to open the Info palette.

TIP All amounts measured by the Measurement tool are displayed in the Info palette.

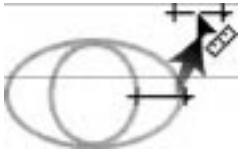
2. Click the Measurement tool in the Toolbox **79**.

TIP The Measurement tool is behind the Eyedropper tool in the Toolbox.

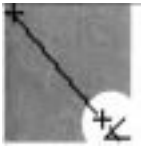
3. Place the Measurement tool on the start point and drag to the end point. A measuring line appears on the page **80**. The Info palette displays the following attributes of the measurement **81**:
   - Horizontal position displays the X coordinate of the first point in the line or whichever point is then moved.
   - Vertical position displays the Y coordinate of the first point in the line or whichever point is then moved.
   - Distance shows the length of the line.
   - Width shows the width of the bounding box that would enclose the line.
   - Height shows the height of the bounding box that would enclose the line.
   - Angle shows the angle on which the line was drawn.



81 *The* measurements displayed in the Info palette *for the measuring line drawn with the Measurement tool.*

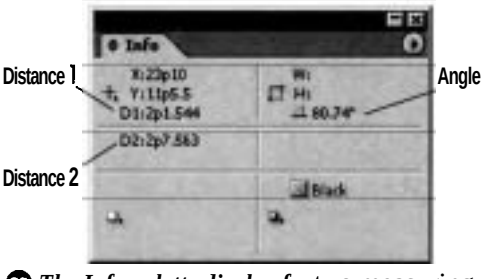


82 Drag the line segment ***of the measuring line to move it to a newposition.***



83 ***The*** angle cursor ***indicates that you are about to create a second measuring line.***

84 **Two** measuring lines ***let you measure angles with the Measurement tool.***



85 ***The Info palette display for*** two measuring lines.

Once you have drawn a measuring line, you can move it to other areas of the page.

To move a measuring line:

1. With the Measurement tool still selected, position the cursor over the measuring line.
2. Drag the line to a new position **82**.

TIP Do not position the cursor over the start or end points of the measuring line.

You can also change the start or end points of the measuring line.

To reposition the points of the measuring line:

1. With the Measurement tool still selected, position the cursor over either point in the measuring line.
2. Drag the point to a new position.

You can also extend a second line out from the origin of the measuring line to create an electronic protractor to measure angles.

To measure angles:

1. Drag the first line with the Measurement tool.
2. Hold the Opt/Alt key and move the Measurement tool back to the origin of the first line. An angle cursor appears **83**.
3. Drag to create a second line extending out from the origin point **84**. The Info palette displays the distance of the second line as well as the angle between the measuring lines **85**.

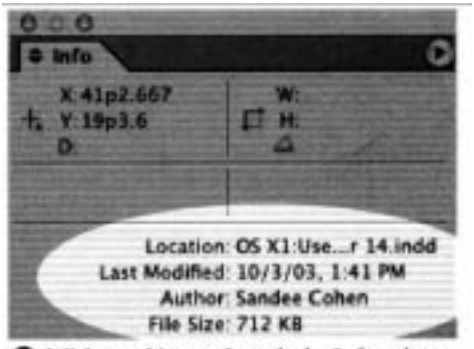
TIP No bounding box is displayed when two measuring lines are created.

Using the Info Palette with Objects

The Info palette also gives you important information about the document, text, and placed images.

To see the document information:

- Deselect any objects on the page. The Info palette displays the following information 86:
  - Location of the file on the computer.
  - Last Modification date and time.
  - Author as entered in the File Info (File >File Info) dialog box.
  - File size.



86 *With no objects selected, the Info palette displays* document information.

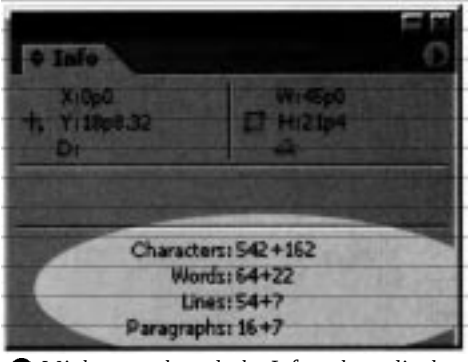
To see the text information:

- Place your insertion point inside a text frame.

  or

  Highlight the text in the frame. The Info palette displays the following information 87:
  - Character in the frame or selection.
  - Words in the frame or selection.
  - Lines in the frame or selection.
  - Paragraphs in the frame or selection.

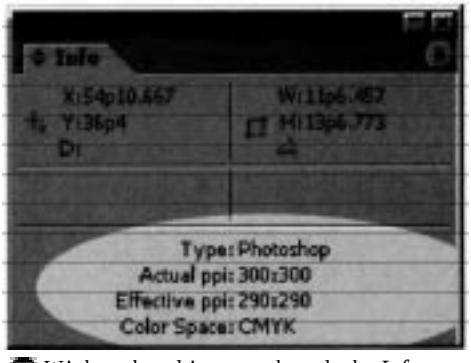
TIP If there is any overflow text in the frame, the amounts are displayed as a plus sign number.



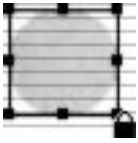
87 *With text selected, the Info palette displays* text information.

To see the placed object information:

- Select a frame that contains a placed image or the placed image itself. The Info palette displays the following information :
  - Type of placed image.
  - Actual ppi resolution of the image.
  - Effective ppi resolution of the image if you have scaled the image in InDesign.
  - Color Space of the image.
  - ICC Profile (if applicable) may also be shown.



With a placed image selected, the Info palette displays placed image information.



The **padlock icon** *indicates that the Lock Position command has been applied.*

Locking Objects

You can also lock objects so they cannot be moved or modified. This prevents people from inadvertently destroying your layout.

TIP **Locking** objects is not the same as **locking** the layers of a document. ***(See Chapter 11, "Layers" for more information on working with layers.)***

To lock the position of an object:

1. Select the objects you want to lock.
2. Choose Object>**Lock** Position. A small padlock appears if you try to move or modify the object 89.

TIP Locked objects can be selected, copied, pasted, and their colors and contents can be modified.

To unlock objects:

1. Select the objects you want to unlock.
2. Choose Object>Unlock Position.

How Safe Are Locked Objects?

I sincerely hope that you lock your front door more securely than the Lock Position command locks objects, although what's bad for your home can be good for your layouts.

The Lock Position command only locks the position of the object. The object can still be selected using either the selection tools or the Select All command.

If there is text within the selected object, the text can be selected and otherwise modified.

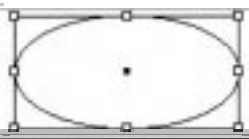
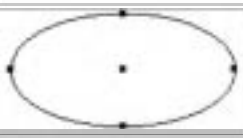
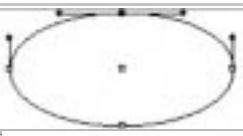
If there is a placed image within the selected object, the image can be replaced by choosing a new object with the Place command *(see page 182)*.

If you need more security for your objects—for instance, to avoid inadvertently changing the color of an object—then you should lock the object's layer *(see page 268)*.

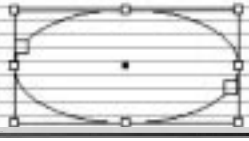
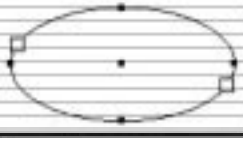
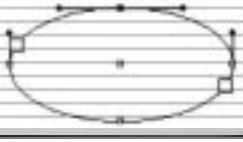
Selecting Frames

Use this chart as a guide to let you know what type of object you have selected and which parts of the object can be selected using the Selection tool or the Direct Selection tool.

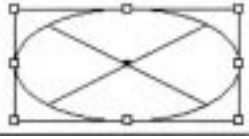
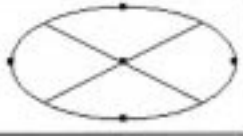
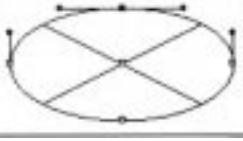
Unassigned frames

Not selected.	Selected with Selection tool. Notice the bounding box around the object.	Selected with Direct Selection tool. Notice there is no bounding box.	One point selected with Dired Selection tool.
			

Text frames

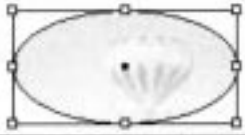
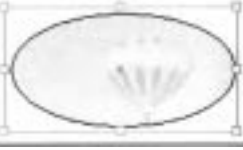
Not selected. Notice there is no indication that this is a text frame.	Selected with Selection tool. Notice the bounding box und the text in and out ports.	Selected with Direct Selection tool. Notice there is no bounding box but the text in and out ports ore visible.	One point selected with Dired Selection tool.
			

Graphic frames

Not selected. Notice the diagonal lines that indicate it is a graphic frame.	Selected with Selection tool. Notice the bounding box.	Selected with Direct Selection tool. Notice there is no bounding box.	One point selected with Direct Selection tool
			

Graphic frames with a placed image

For more information on working with placed images, see Chapter 8, "Imported Graphics."

Not selected.	Frame selected with Selection tool. Notice the bounding box for the frame.	Frame selected with Direct Selection tool. Notice there is no bounding box but the points are selected.	Content selected with Direct Selection tool. Notice that the color of the bounding box for the placed image is the inverse of the color of the bounding box for the frame.
			

WORKING IN COLOR 5

When I first started in advertising, only the senior creative teams could work in color. The junior teams were assigned only black-and-white ads. Later on they might be able to work on a two-color job, but the four-color work was handled by senior art directors.

Fortunately, you're not limited by such constraints. **InDesign** gives you, right from the first day you use it, **all** the color controls you could ever wish for. However, with that power comes some responsibility.

When you define colors and use them on your pages, you are wearing two hats. Your first hat is that of a designer who looks at the aesthetics of the page and then applies colors. This is where you have fun with your creativity.

Your second hat is that of production manager. Wearing that hat you need to understand some of the priniciples of color and printing color documents. You also need to make sure your colors are defined so they print correctly.

The Basics of Color

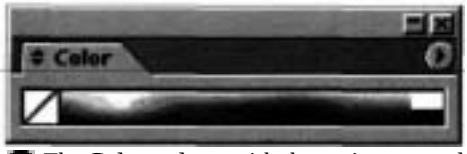
Here's a quick primer to help you understand what happens when you define and apply colors in your InDesign layout as well as other programs. For more information on working with color in computer graphics applications, I recommend ***The Non-Designer's Scan and Print Book*** by Sandee Cohen and Robin Williams published by Peachpit Press. I also recommend ***Pocket Pal Graphic Arts Production Handbook,*** now in its nineteenth editing, published by International Paper. You can order Pocket Pal at www.ippocketpal.com.

Type of Color	How is it used	How is it created	Comments
CMYK	CMYK stands for the Cyan, Magenta, Yellow, and Black inks that are combined to create other colors. ***(See the sidebar on page 113 for why Black is K.)*** Also called process color, this is the primary type of color used in color printing. Most magazines and brochures are printed using the four process color inks.	Use the Color palette set to CMYK ***(see page 112)*** or the New Color Swatch dialog box set to CMYK ***(see page 118).***	Color images are saved in the CMYK mode before they are imported into InDesign.
RGB	RGB stands for the Red, Green, and Blue lights that are used in computer monitors to display colors. Because RGB colors are based on lightwaves, not inks, there will always be a slight difference between colors defined as RGB and those defined as CMYK. RGB colors can be used to define colors for documents that will be displayed onscreen. But you should not use them for print work.	Use the Color palette set to RGB ***(seepage 113)*** or the New Color Swatch dialog box set to RGB ***(see page 118).***	Most scanners save images as RGB files. You must use a program such as Adobe Photoshop to convert those images to CMYK.

Type of Color	How is it used	How is it created	Other comments
LAB	The LAB is another light-based color model that uses luminance (L) combined with the green to red (a) plus yellow to blue (b). Like RGB, you should not define print colors using this system.	Use the Color palette set to **LAB** *(see* page 114) or the New Color Swatch dialog box set to **Lab** *(see* page 118).	
Spot colors	Spot colors are specialty colors that are printed without using the four process color inks. For instance, a metallic gold in a brochure is printed using metallic gold **ink,** not a combination of CMYK colors. Spot colors can be mixed to display colors that could not be created using simple CMYK colors.	Use the New Color Swatch dialog box set to Spot (see page 118).	Spot colors can be defined by the user or you can use the commercial spot color libraries produced by companies such as **Pantone** and Dicolor and **Toyo** (see page 124). Other names for spot colors are specialty, second color, fifth or sixth color, or flat colors.
Tints	Tints are colors that have been screened so that only a percentage of their color appears on the page.	Tints can be created from named colors using the New Tint dialog box (see page *130).*	
Mixed Inks	Mixed Inks are combinations of at least one spot color and another spot or process color.	Mixed Inks can be created using the Swatches palette menu (see page *126).* One spot color must also have been previously defined.	Mixed Ink Groups are combinations of different percentages for Mixed Ink colors (see page 128).

Using the Color Palette

There are three different models for defining colors: CMYK, RGB, and LAB. Each model is used for different purposes. You choose the color mode and mix colors in the Color palette. *(See Chapter 6, "Styling Objects," for how to apply colors to objects and text.)*



❶ *The* Color palette *with the options turned off shows only the spectrum or ramp for choosing colors.*

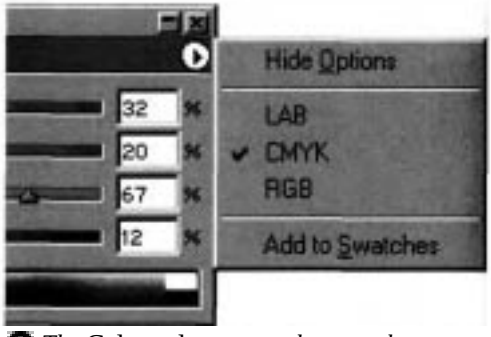
To choose the options in the Color palette:

1. If the Color palette is not visible, choose Window>Color to open the palette ❶.

   or

   If the Color palette is behind other palettes, click the Color palette tab.
2. If the color sliders are not visible, click the palette tab or choose Show Options from the Color palette menu ❷.

TIP Hold the Shift key as you drag one slider to have the others move along with it.



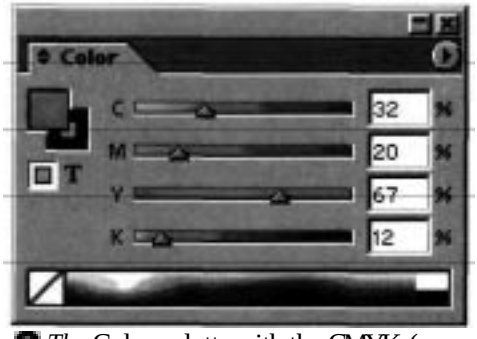
❷ *The* Color palette menu *lets you choose among the three color models.*

The CMYK color model is used primarily for print work. CMYK colors are mixed using percentages of the four inks used in process printing: cyan, magenta, yellow, and black.

To define CMYK colors:

1. Choose CMYK from the Color palette menu. This opens the palette in the CMYK mode ❸.
2. Choose one of the following methods to define the amount of cyan, magenta, yellow, or black **ink** in the color:
   - Type a value from 0 to 100 percent in each of the four color fields.
   - Drag the sliders for each of the four color fields.
   - Click a color in the CMYK spectrum area.

TIP Click the solid white or black rectangles to the right end of the spectrum to quickly get 100% black or white.



❸ *The* Color palette with the CMYK (cyan, magenta, yellow, and black) color controls.

The Black Color Palette

If your Color palette displays a single slider for Black, it is because the Black color in the Swatches palette is your default color. Simply change it to CMYK to get the full set of CMYK color sliders.

Understanding CMYK Color

Each of the colors in CMYK corresponds to one of the inks used in typical four-color printing. Cyan is a shade of blue. Magenta is a shade of red. Yellow is ... well, yellow. And black is black—I want my baby back.

If you are creating print documents, you will want to define your colors using CMYK colors. Not only is the CMYK system overwhelmingly used for print work, it is the system you are mdst familiar with, whether you're aware of it or not. Yellow and cyan make green; magenta and yellow make orange, and so on.

In theory, you shouldn't need more than three colors for printing. If you mix cyan, magenta, and yellow together, you should get a solid black color. In reality, however, those inks are not pure enough to create solid black; instead they create a dark brown.

That's why process printing uses four colors. In addition to cyan, magenta, and yellow, a fourth *key color*—black, indicated by the letter K—is added to create the really black areas. That's where the term CMYK comes from.

❶ *The Colorpalette set for mixing RGB* (red, green **blue)** color controls *for onscreen display such as Web sites.*

Mixing Colors in RGB

Maybe some Web designers and video engineers can think in RGB, but I confess, I can't. With the RGB sliders, red plus green creates yellow; green plus blue creates a shade of cyan, and all three colors together create white. To create black, you set all three colors to zero. It's the exact opposite of CMYK where the colors combine to create black.

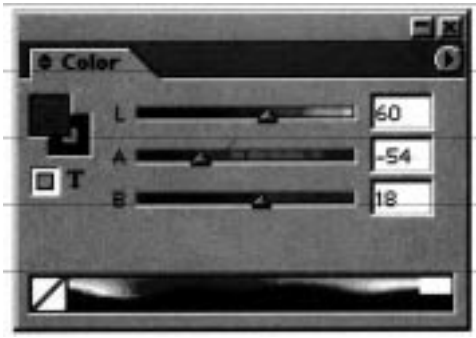
The **RGB** color model is used primarily for **onscreen** work such as presentations and Web sites. The **RGB** colors—red, green, and blue—are mixed using representations of the three colors of light. This is what you see on television screens and computer monitors. **RGB** colors have a wider range of colors than CMYK colors.

To mix RGB colors:

1. Choose **RGB** from the Color palette menu. This opens the palette in the **RGB** mode ❶.
2. Choose one of the following methods to define the amount of red, green, or blue in the color:
   - Type the value from 0 to 255 in each of the three color fields.
   - Drag the sliders for each of the three color fields.
   - Click a color in the **RGB** spectrum area.

The LAB color model defines colors according to a luminance (lightness) component, and two color components, a and b. The *a* component defines the green to red values. The b component defines the blue to yellow values. LAB colors are designed to be device-independent so that the color does not change from one source to another.

TIP The proper name for LAB is L*A*B and is pronounced by spelling out the name (el-ay-bee), not by saying the word "lab".

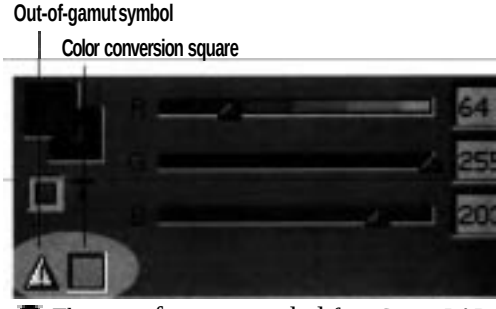


❺ *The LAB* Color palette *mixes colors that look consistent no matter whether you print or display them onscreen.*

To mix LAB colors:

1. Choose LAB from the Color palette menu. This opens the palette in the LAB mode ❺.
2. Choose one of the following methods to define the three components of the color:
   - Type the value from 0 to 100 in the L field or type the value from -128 to 127 in the A or B fields.
   - Drag the sliders for each of the fields.
   - Click a color in the LAB spectrum area.

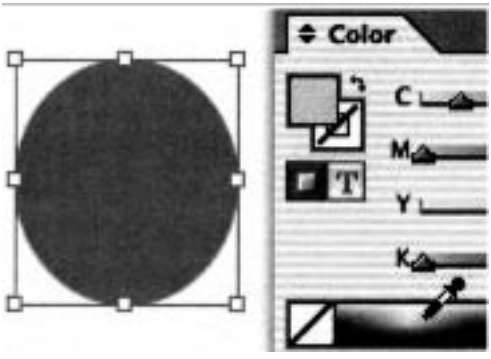
The out-of-gamut symbol appears if you choose an RGB or LAB color that cannot be printed using process inks ❻.



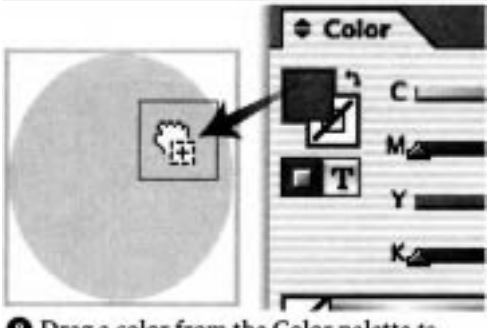
❻ *The* out-of-gamut symbol *for* RGB *or LAB colors indicates that the color shown on screen will* ***not print*** *as seen usingprocess color inks.*

To convert out-of-gamut colors:

- Click the small square next to the out-of-gamut symbol. This converts the color to the closest process-color equivalent.



❼ *With an object selected,* **click** *the* **color ramp** *in the Colorpalette to apply a color to an object.*



❽ **Drag a color from the Color palette** *to apply a color to an object.*

You can use the Color palette to apply colors to selected objects.

TIP This technique, while convenient to use, creates unnamed colors or colors that are not listed in the Swatches palette. *(See the sidebar on page* ***123*** *as to why creating unnamed colors can be a problem.)*

To apply colors to a fill or stroke:

- With an object or text selected, use the Color palette to **define** a fill color. This applies the unnamed color to the fill of the object or text. *(Seepage* ***138*** *for how to set* ***the fill*** *color of an object.)*

  or

  With an object or text selected, use the Color palette to define a stroke color. This applies the unnamed color to the stroke of the object or text. *(Seepage* ***142*** *for how to set the stroke color of an object.)*

TIP You can choose colors by clicking the ramp section of the Color palette ❼.

TIP You can also drag a color directly from the Color palette onto objects ❽. This also creates unnamed colors.

You can add colors from the Color palette to the Swatches palette so you can easily reuse them. *(See the next section for more techniques to store colors.)*

To transfer colors from the Color palette:

1. Define the color in the Color palette.
2. Choose Add to Swatches from the Color palette menu. The color appears as a new color swatch in the Swatches panel.

Defining and Storing Swatches

Although it is very quick to create a color using the Color palette, you will find it more efficient to create color ***swatches.*** A swatch is a color that has been defined and is stored in the Swatches palette.

TIP Unnamed colors are not available for all places where you use colors. For instance, only named color swatches can be used as part of text styles *(seepage 328).*

To work with the Swatches palette:

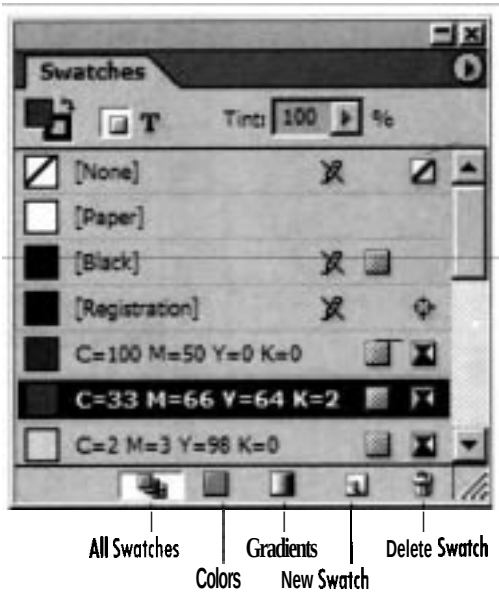
1. If the Swatches palette is not visible, choose Window>Swatches to open the palette ❾.

   or

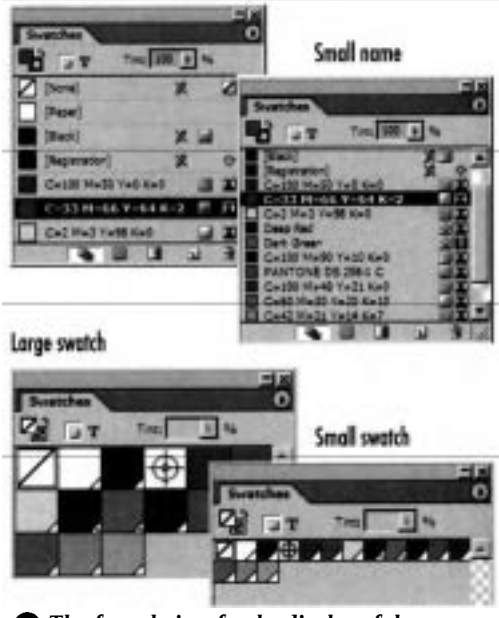
   If the Swatches palette is behind other palettes, click the Swatches palette tab.

2. To see the different types of swatches, click the icons at the bottom of the palette as follows:
   - Show ***All*** Swatches displays both the color and gradient swatches.
   - Show Color Swatches displays only the color swatches.
   - Show Gradient Swatches displays only the gradient swatches *(see page 132).*
3. To change the display of the swatches in the palette, choose the following from the Swatches palette menu ❿:
   - Name displays a list of the swatch names in a large typeface.
   - Small Name uses a more compact typeface to display the swatch names.
   - Small Swatch displays only the square of the swatch color or gradient.
   - Large Swatch displays a larger square of the swatch color or gradient.

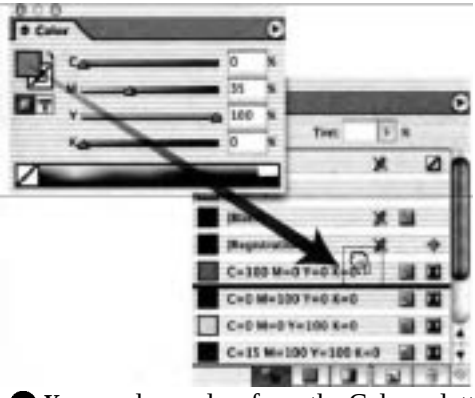
TIP Each icon for the types of swatches has its own display setting. So the color swatches can be displayed in the Small Name setting while the gradients are shown in the Large Swatch display.



❾ *The* Swatches palette *shows all the saved colors.*



❿ *The four choices for the display of the Swatches palette.*



⓫ *You can* drag colors from the Color palette *into the Swatches palette.*

Although you can apply colors to objects and text directly from the Color palette, this is not considered a good production workflow. Instead, use the Swatches palette to add the color currently defined in the Color palette.

TIP If you apply colors from the Color palette, they are called unnamed colors. Unnamed colors can cause production problems later on and should be avoided. *(See "Avoiding Unnamed Colors" on page 123.)*

To add a color to the Swatches palette:

1. Use the Color palette to define a color *(see page 112)*.
2. Click the New Swatch icon at the bottom of the palette. The new color, named with the color values, is automatically added to the Swatches palette.

InDesign also lets you drag colors from the Color palette into the Swatches palette.

To drag colors into the Swatches palette:

1. Create the color in the Color palette.
2. Drag the color from the Color palette fill or stroke box to the bottom of or between two colors in the Swatches palette.
3. Release the mouse when a black line appears in the Swatches palette ⓫. The new color is added and automatically takes its name from the color values.

TIP The cursor displays a plus sign as you drag the color into the Color palette. On the Mac the cursor is the image of a fist. On Windows the cursor is an arrow.

The Color "Paper"

The swatch labeled [Paper] in the Swatches palette allows you to change the background color of the pages in your document. This can be helpful if your document will be printed on colored paper, specialty paper, or even newsprint that is not completely white. You can modify the paper color to help judge how your images will look when printed.

The Registration Color

"Registration" is a color that is set to print on all plates of a document. For instance, if your document will be printed using process colors, you might want to create a note or mark that should be seen on all four plates. Rather than make the note in a combination of cyan, magenta, yellow, and black, you can apply the color Registration to the text for the note. This prints the note as a combination of all four inks.

You can **define** and add new colors to your document using only the Swatches palette.

To define a new color swatch:

1. Choose New Color Swatch from the Swatches palette menu. This opens the New Color Swatch dialog box ⓬.

   or

   Opt/Alt-click the New Swatch icon at the bottom of the Swatches palette.

2. To name the color swatch yourself, deselect the **checkbox** for Name with Color Value and then type a name in the Swatch Name field.

   or

   Leave the setting checked to name the color swatch using the values that define the color. This option is not available for spot colors.

3. Choose Process or Spot from the Color Type pop-up list ⓭. *(See the sidebar "Process or Spot?" on the* ***next page*** *for an explanation of the* ***difference*** *between process and spot color.)*

4. Choose LAB, CMYK, or RGB from the Color Mode menu ⓮. *(See "The Basics of Color" on page 110 for a description of the three color modes.)*

   or

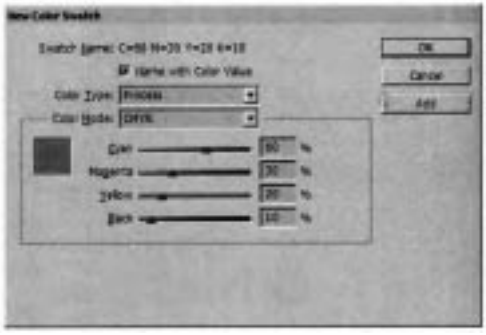
   Choose one of the Swatch Libraries at the bottom of the Color Mode menu ⓮. *(See "Using Swatch Libraries" on page 124 for how to use these types of colors.)*

5. If you have chosen LAB, CMYK, or RGB, use the sliders to change the values from the ones originally defined.

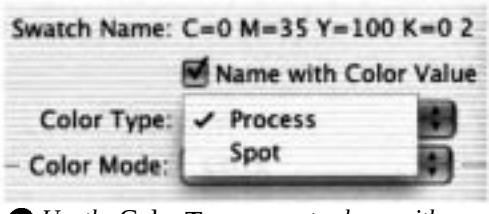
6. Click OK. This adds the swatch and closes the dialog box.

   or

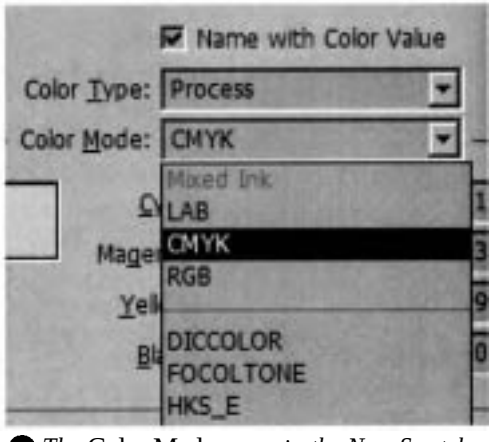
   Click Add to add the swatch without closing the dialog box. This allows you to define additional colors.



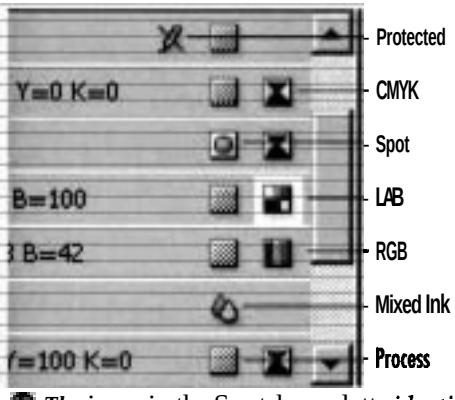
⓬ *Use the* New Color Swatch dialog box *to define colors to be added to the Swatchespalette.*



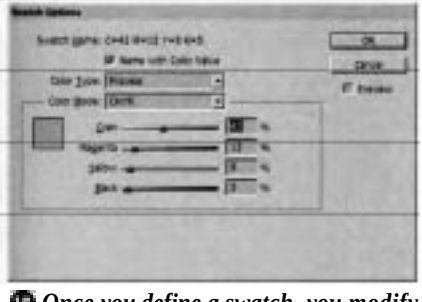
⓭ *Use the* Color **Type menu** *to choose either process or spot colors.*



⓮ *The* Color Mode **menu** in *the New Swatch dialog box.*



15 *The* icons in the Swatches palette *identify the different types of colors and color modes.*



16 *Once you define a swatch, you modify it in the* Swatch Options dialog box.

The colors that appear in the Swatches palette are displayed with icons that give you information about the type of color, the color mode, and other attributes 15. Of course, once you have defined a color swatch, you can modify its color definition. This changes the appearance of **all** text and objects that use that color, even if they are not selected.

TIP The color Black is protected and cannot be modified. If you need a variation of Black, create a new color swatch.

To modify a color swatch:

1. Select the swatch and choose Swatch Options from the Swatches palette menu. This opens the Swatch Options dialog box 16. These are the same controls as in the New Color Swatch dialog box.

   or

   Double-click the swatch in the palette.

2. Make changes to the color.

TIP Click the Preview **checkbox** to see how the changes affect the colors applied to objects in the document.

3. Click OK to apply the changes.

TIP The Swatch Options dialog box does not have an Add button. This is because you use this dialog box only to modify existing colors—not to add new ones.

Process or Spot?

Process colors are those printed using small dots of the four process inks, cyan, magenta, yellow, and black. Spot colors are printed using special inks. For example, if you look at the process-color-green printed-in a magazine, that color is actually a combination of cyan and yellow printed together in a series of dots. However, a spot-color green is printed by using actual green ink.

One benefit of spot colors is that you can exactly match a special color or use specialty colors such as fluorescents or metallics that could never be created using process inks. You can also use a spot color together with black as a two-color job. This is cheaper than printing four-color process colors. The benefit of process colors is that you use just four inks to create thousands of different color combinations.

Once you create color swatches, you can apply them via the Fill and Stroke controls in the Toolbox or Color palette.

To apply a swatch color:

1. Create the object or text that you want to color.
2. Select either the **Fill** or Stroke icons in the Color palette or Toolbox. *(See Chapter 6 "Styling Objects," for more information on the Fill or Stroke icons.)*
3. In the Swatches palette, click the color you want. This applies the swatch to the object.

To delete swatches:

1. Select the color you want to delete.

TIP To select a series of adjacent swatches, select the first swatch and then hold the Shift key and select the last swatch in the series. This highlights the first and last swatch and all the swatches in between.

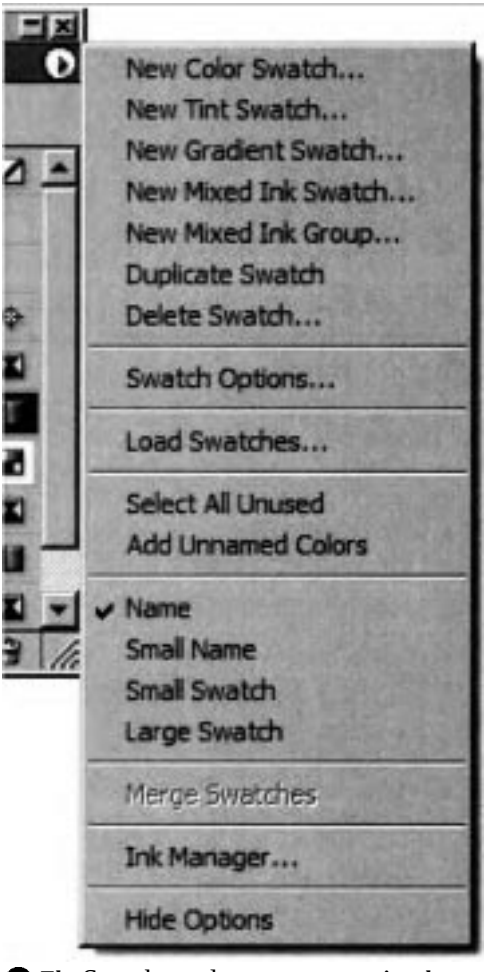
TIP Hold the Command/Ctrl key to select non-adjacent swatches.

2. Click the Delete Swatch icon ⓱ or choose Delete Swatch from the Swatches menu.
3. If the swatch is used within the document, the Delete Swatch dialog box appears asking how you want to replace the deleted swatch ⓰:
   - To swap the color with one from the Swatches palette, choose Defined Swatch and then pick a swatch from the pop-up list.
   - To leave the color as an unnamed color applied to the object, choose Unnamed Swatch. *(See page 123 for more information on unnamed colors.)*

TIP The default swatches None, Paper, Black, and Registration cannot be deleted.

⓱ *Click the* **Delete Swatch icon** *to delete the selected swatches.*

⓰ *The* **Delete Swatch dialog box** *controls what happens to colors when they are deleted from a document.*



⓳ *The* Swatches palette menu *contains the commands for working with color swatches.*

If you have many colors in your document that you are not using, you may want to delete them to avoid confusion when the file is sent to a print shop.

To delete all unused swatches:

1. Choose Select All Unused in the Swatches palette menu ⓯.
2. Click the Delete Swatch icon or use the Delete Swatch command in the Swatches palette menu.

You can also select several swatches and merge them into one color.

TIP The Merge Swatches command makes it easy to globally replace **all** instances of one defined color with another.

To merge swatches:

1. Click to select the first color. This is the final color that you want the other colors to change to.
2. Hold the Cmd/Ctrl key and click to select another swatch. This is the color that you want to delete.

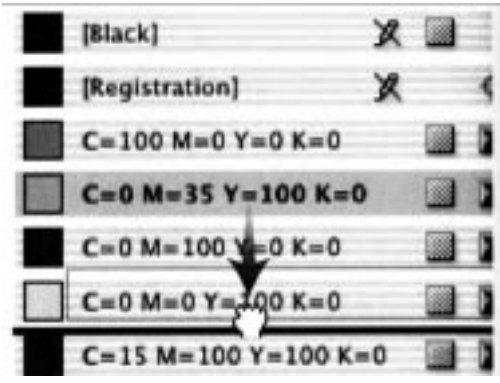
   or

   Hold the Shift key and click to select a range of swatches. These are the swatches you want to delete.
3. Choose Merge Swatches from the Swatches palette menu ⓳. This deletes **all** the swatches except the swatch that was first selected. That swatch is applied to **all** text and objects that used the deleted swatches.

The position that swatches appear in the palette comes from the order in which they were created, You can easily change the order of the swatches.

To move swatches to new positions:

1. Select a swatch in the palette.
2. Drag the swatch to a new position. A black line indicates where the swatch will be located.
3. Release the mouse button.



Drag a swatch to move it from one position to another.

You may find it easier to duplicate a swatch and modify it than to start from scratch.

To duplicate a swatch:

- Select the swatch and choose Duplicate Swatch from the Swatches palette menu.

  or

  Select the swatch and click the New Swatch icon.

  or

  Drag the swatch onto the New Swatch icon.

You can also import the swatches from one document into another.

To import swatches from other documents:

1. Choose Load Swatches from the Swatches palette menu. The operating system dialog box appears.
2. Navigate to find the document you want to import swatches from.
3. Click Open. The swatches are imported into the current document.

The Cost of Unused Colors

Why is it important to delete unused colors?

One reason is if you are going to send your documents to a service bureau or print shop for final output. It can be confusing to the people who are going to open your file if they see many colors in a document that's supposed to be vrinted in black and white.

At the very least, they're going to wonder if they've received the right instructions. At the worst, they delay printing the file until they talk to someone to make sure.

Also, it may seem like a little thing, but every color adds to the size of the file, Even in these days of huge hard drives, it's always better to keep your files as lean as possible.

Avoiding Unnamed Colors?

Why do I warn you against creating unnamed colors? Why may your service bureau warn you not to create unnamed colors?

Your job will most certainly print, even with unnamed colors. The problem comes when someone checks to make sure all your colors are defined correctly.

Because the unnamed colors don't appear in the Swatches palette, there is no way for someone to easily find or make a universal change to the colors in your document. So the checker will have to search, page by page, to see if there are any unnamed colors.

So, although there is nothing actually wrong with unnamed colors, it is better to always use the Swatches palette to apply colors. That way you'll have more control over the colors in your document.

Unnamed colors are colors that are applied to objects directly from the Color palette instead of through the Swatches palette.

You may find it difficult to modify unnamed colors if they are scattered through a document. Even if you can keep track of them, others who work with your file may not. Your service bureau or print shop may also have problems working with unnamed colors. Fortunately, you can easily convert unnamed colors into named colors.

To name unnamed colors:

- Choose Add Unnamed Colors from the Swatches palette menu. *All* unnamed colors are added to the palette named with their percentage values.

TIP Double-click each swatch to change its name in the Swatch dialog box ***(seepage 118)***.

When you define and store colors with a document open, those colors are stored in the Swatches palette for that document. You can create colors that are available as the default colors for all new documents.

To create default colors:

1. Close all documents but leave InDesign running.
2. Use any of the methods in this section, "Storing Colors" to define and store a color in the Swatches palette. The color will appear in the Swatches palette of all new InDesign documents.

Using Swatch Libraries

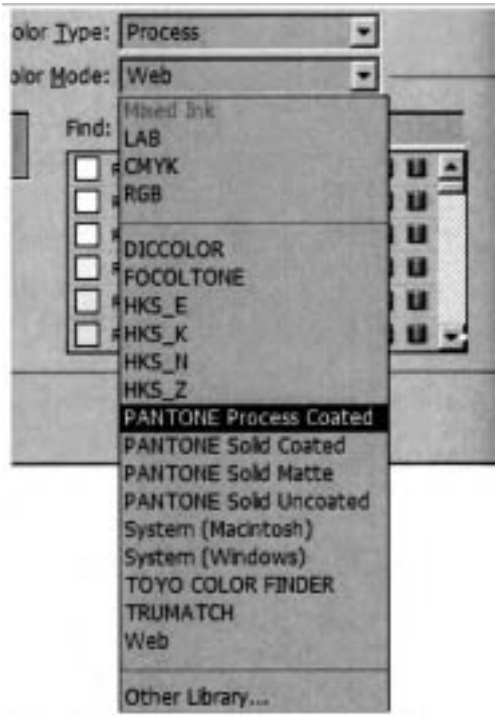
Rather than defining your own color mixtures, you can use the swatch libraries from professional color systems from companies such as Pantone or Trumatch. These color libraries usually have printed samples that you can refer to in order to see how the color will appear when printed.

To add colors from swatch libraries:

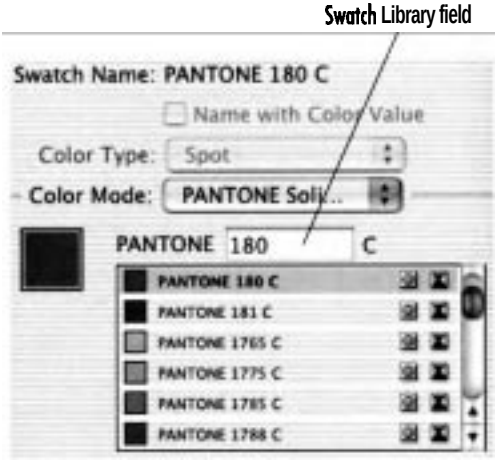
1. Open the New Swatch dialog box *(see page 118)* or the Swatch Options dialog box *(see page 119)*.
2. Choose one of the Swatch Libraries listed in the Color Mode list ㉑. This displays the colors in the library ㉒.
3. Scroll through the library to select the color you want to add to your document.

   or

   Instead of scrolling through a long list, type the name or number associated with the color in the Swatch Library field.



㉑ *The* **Swatch Libraries** *in the Color Mode list.*



㉒ *An example of the window that displays a swatch library, such as the Pantone Solid Coated colors.*

You can use the Swatch Libraries to open color palettes from other InDesign documents and Adobe Illustrator documents.

To import swatches from other documents:

1. Choose Other Library from the Color Mode list.
2. Navigate to select the InDesign or Illustrator document. The colors appear in the window.

The Swatch Libraries

InDesign ships with a collection of third-party swatch libraries that contain the color definitions used by professional color systems. Here is a description of each of the types of libraries.

Dicolor holds the spot colors that can be matched using the DIC Color Guide. These color guides, from Dainippon Ink and Chemicals, Inc., are used mainly in Japan.

Focoltone holds the process colors that can be matched using materials that are available from Focoltone International, Ltd. These colors are very popular in both France and the United Kingdom.

HKS is a system of spot colors used for industrial design and production in Europe. InDesign provides four categories of colors in the HKS system.

Pantone is the major color-matching system company used in North America. InDesign provides several types of Pantone libraries. Pantone Process Coated consists of process colors. Pantone Solid Coated contains spot colors. Pantone Solid Uncoated consists of the same spot colors as Coated, adjusted so they represent printing on uncoated paper. All Pantone colors can be matched to materials available from Pantone, Inc.

System (Macintosh) includes the colors of the Macintosh operating system.

System (Windows) includes the colors of the Windows operating system.

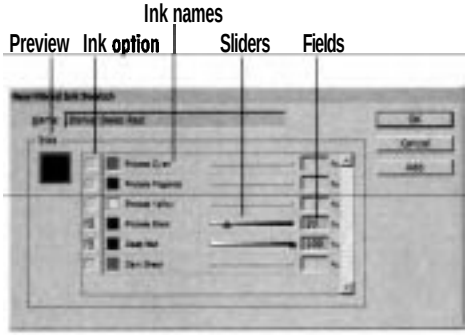
Toyo consists of spot colors used primarily in Japan. Color matching materials are available from the Toyo Ink Manufacturing Co., Ltd.

Trumatch provides a library of process colors. These colors have been specially designed for digital prepress as well as desktop color printers and copier machines. Color matching materials are available from Trumatch, Inc.

Web consists of the 216 colors that are shared by both the Macintosh and Windows system colors. These are sometimes called the Web-safe colors.

Creating Mixed Inks

Mixed inks is the term InDesign uses for a color that combines a spot color with other spot colors or process colors. (QuarkXPress calls this type of color a *multi-ink.)* Mixed inks give you more flexibility in creating colors, especially for two-color jobs.



23 *The* New Mixed Ink Swatch dialog box *allows you to combine a spot color with other colors.*

To create a single Mixed Ink swatch:

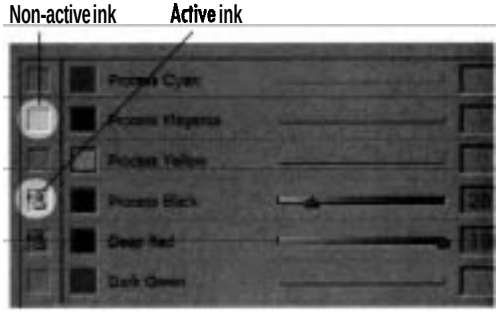
1. Choose New Mixed Ink Swatch from the Swatches palette menu. This opens the New Mixed Ink Swatch dialog box 23.

TIP The command to create mixed inks is not available unless you have first defined a spot color in the Swatches palette.

2. Enter a name for the mixed ink swatch.
3. Click the ink controls to select the colors in the mixed ink swatch. You must choose two inks and one of them must be a spot color ink 24.
4. Use the sliders or fields to set the amount of each ink in the swatch.
5. Click the OK button to create the mixed ink swatch.

   or

   Click the Add button to create the mixed ink swatch and then use the dialog box to define a new mixed ink swatch.



24 *Use the* ink controls *to define the colors in the mixed ink swatch.*

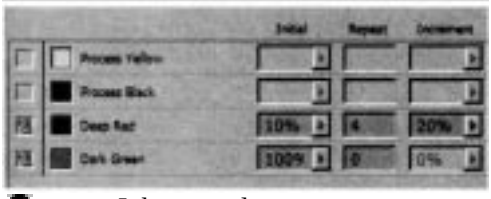
Using Mixed Ink Swatches

Mixed ink swatches have a variety of uses. Perhaps the most common use is to define a mixed ink as a single spot color plus a percentage of process black This allows you to create a slightly darker version of a spot color. I find this extremely helpful when working on two-color jobs where I need to darken my spot color.

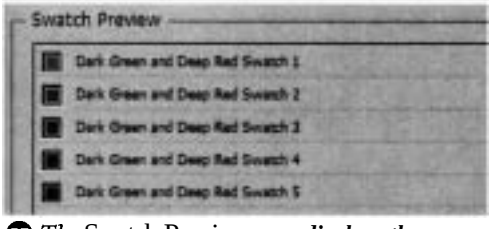
You can also use mixed ink swatches to combine two spot colors. For Instance, you can combine a spot yellow with a spot blue to create a green mixed ink swatch. However, be careful when you try to mix spot colors. The color in the preview box is only a very rough representation of the actual color on press.

Finally, you can use mixed inks to combine varnishes with process colors. This is a sophisticated technique and you should consult with your print shop.

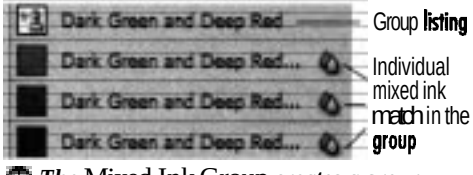
25 *The* **New Mixed Ink Group dialog box** *allows you to automatically create a series of mixed inks.*



26 *Use the* Inks controls *to set the mixed ink colors, the initial amounts, the repetitions, and the increments by which they change.*



27 *The* Swatch Preview area *displays the mixed ink swatches created by the Mixed Ink Group controls.*



28 *The* Mixed Ink Group *creates a group listing as well as individual mixed ink swatches.*

You might want to create a collection of mixed inks that combine colors in an increasing series of mixtures. InDesign calls this a Mixed Ink Group and makes it easy to automatically create the mixtures of colors.

TIP A Mixed Ink Group makes it easy to create a variety of mixed inks that can be quickly applied as you work.

To create a Mixed Ink Group:

1. Choose New Mixed Ink Group from the Swatches palette menu. The New Mixed Ink Group dialog box appears 25.
2. Enter a name for the group in the Name field.
3. Click the Inks controls to select the colors in the mixed ink swatch. You must choose at least two inks and one of them must be a spot color ink.
4. Use the Initial field to define the amount of color that the first instance of an ink has 26.
5. Use the Repeat field to set how many new mixed inks will be created with the color.

TIP Set the Repeat to zero to keep that color constant throughout the mixed ink group.

6. Use the Increment field to set the color increases for each new mixed ink.
7. Click the Preview Swatches button to see the result of the settings in the Swatches 27.
8. Click OK to create the Mixed Ink Group. The group appears in the Swatches palette 28.

Once you have created a mixed ink group, you can make changes to the entire group or the individual swatches in the group.

To modify the swatches in a mixed ink group:

1. Select the mixed ink group in the Swatches palette and choose Swatch Options from the Swatches palette menu.

   or

   Double click the name of the mixed ink group in the Swatches palette. The Mixed Ink Group Options dialog box appears (39).
2. Use the Name field to change the name of the group.
3. Use the ink controls to delete inks from the mixed ink group.

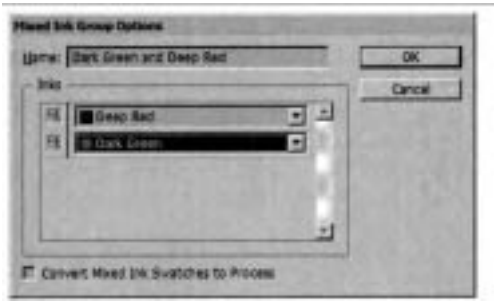
TIP While you can delete inks from the group, you cannot add inks. So a two-ink group can't be changed to a three-ink group.

4. Use the Ink list to swap one ink for another (40). The list shows both the process and spot colors in the document.
5. If desired, check Convert Mixed Ink Swatches to Process. This changes all the colors in the mixed ink swatches to their process color equivalents.

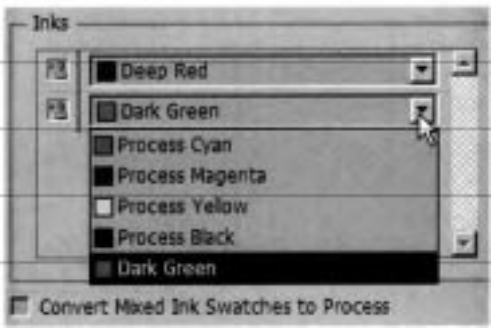
TIP The option to convert the colors to process is permanent and cannot be changed except as part of InDesign's undo chain.

6. Click OK. The changes are applied to the inks used in the mixed ink swatches that you originally created.

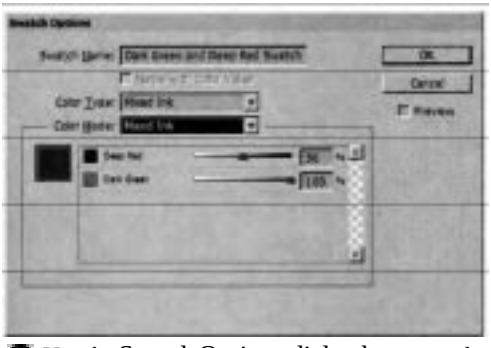
TIP Watch out! Once you have deleted inks from the mixed ink group, you cannot go back and add them back to the mixed ink group. You will have to regenerate the entire mixed ink group.



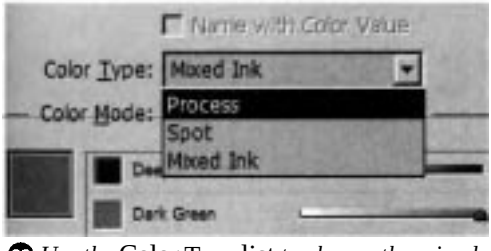
(39) *Use the* **Mixed Ink Group Options dialog box** *to make changes to the inks used in a mixed ink group.*



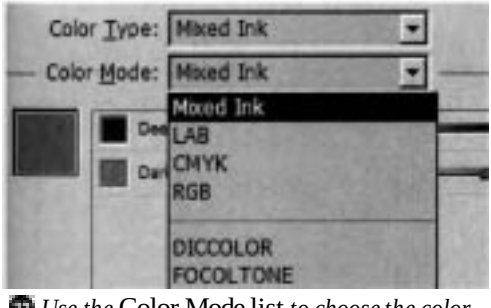
(40) *Use the* **Ink list** *to change the colors used in a mixed ink group.*



31 *Use the* Swatch Options dialog box *to make changes to individual swatches.*



32 *Use the* Color Type list *to change the mixed ink swatch to either a process or spot color.*



33 *Use the* Color Mode list *to choose the color mode or select one of the swatch libraries.*

Once you have created a mixed ink swatch, you can modify any of its attributes such as the name, color type, or ink percentages.

To modify a mixed ink swatch:

1. Select the mixed ink swatch in the Swatches palette and choose Swatch Options from the Swatches palette menu.

   or

   Double click the name of the mixed ink swatch in the Swatches palette. The Swatch Options dialog box appears 31.
2. Use the Color Type list to change the type of swatch from Mixed Ink to either Process or Spot 32.
3. Use the Name field to change the name of the swatch.
4. If you have changed the color type to Process, you can select the option for Name with Color Value.
5. Use the Color Mode list to change the color to LAB, CMYK, or RGB 33.

   or

   Choose one of the Swatch Libraries.

TIP Changes to the Color Mode and Color Type remove the swatch from the mixed ink group. These colors cannot be converted back into mixed inks.

6. Use the sliders to change the amount of inks in the mixed ink swatch.

TIP If you change only the sliders for the mixed ink swatch, the color retains its connection to the inks defined in the Mixed Ink Group Options.

7. Click OK to apply the changes.

Creating Tints

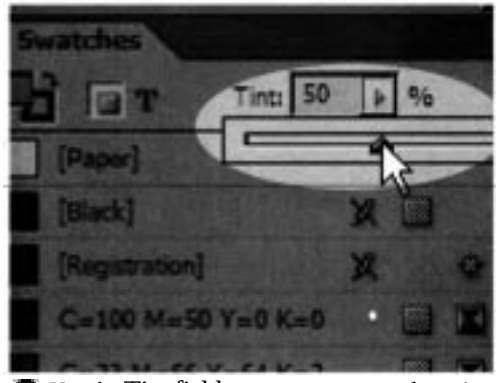
Tints are screened or lighter versions of colors. Spot color tints create screens of the base color. Process color tints reduce the amounts of the process inks that define the color.

To create a tint swatch:

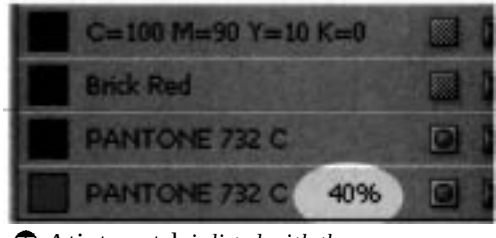
1. Select the **base** color, that is, the swatch color that you want to tint.
2. Use the Tint field in the Swatches palette to create a screen of the swatch color (34).
3. Click the New Swatch icon to store the tint percentage as a swatch in the Swatches panel.

TIP The tint swatch appears in the Swatches palette with the same name as the base color but with the tint percentage listed (35).

TIP The tint field percentage continues to tint other swatches in the palette until you reset the field to 100%.



(34) *Use the* Tint field *to create a screened version of a swatch color.*

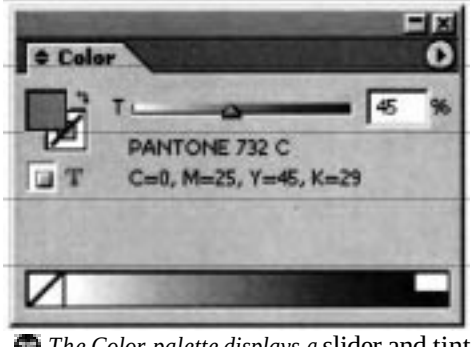


(35) *A* tint swatch *is listed with the same name as the base color and the tint percentage.*

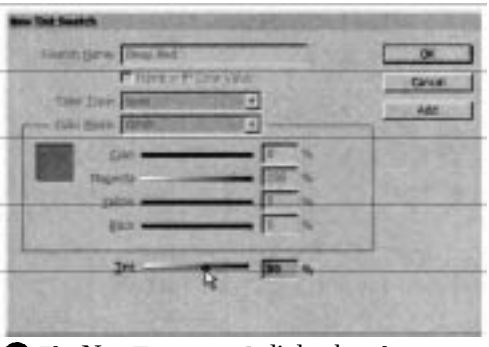
As you select a color swatch as a base color, the Color palette displays a slider and a ramp of the color.

To tint a swatch using the Color palette:

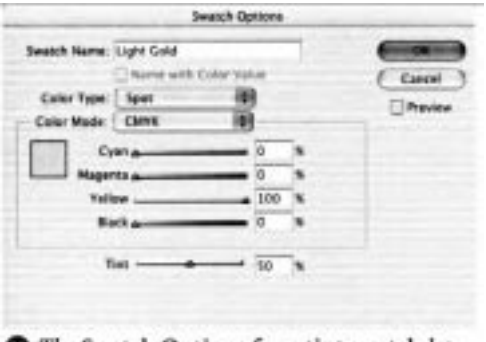
1. Select the swatch color that you want to tint.
2. In the Color palette, use the slider or click in the ramp to create a percentage of the base color (36).
3. Click the New Swatch icon to create a tint swatch of the percentage you defined.



(36) *The Color palette displays a* slider and tint ramp *when a base color is chosen.*



37 ***The*** New Tint **Swatch** dialog box ***lets you set the percentage of a tint.***



38 *The* **Swatch Options for a tint swatch** *let you change the tintpercentage or modify the base color of the tint.*

You can also create a tint swatch using the Swatches palette menu.

To store a tint swatch of a color:

1. In the Swatches palette, select the ***base color,*** that is, the color you want to tint.
2. Choose New Tint Swatch from the Swatches palette menu. The New Tint Swatch dialog box appears **37**.
3. Adjust the tint slider to a percentage.
4. Click OK. The tint swatch appears in the Swatches palette with the same name as the base color but with the tint percentage listed.

   or

   Click Add to add the tint to the Swatches palette and then create additional tints.

Once you store a tint swatch, you can modify the tint percentage. This updates all the objects that use that tint swatch.

To modify tint swatches:

1. Double click the name of the tint swatch in the Swatches palette. This opens the Swatch Options dialog box for tints **38**.

TIP This dialog box is slightly different from the ordinary Swatch Options dialog box which does not have a tint slider.

2. To change the tint value, adjust the Tint slider at the bottom of the dialog box.

TIP You can also modify the sliders for the base color when you open the Swatch Options dialog box to modify a tint.

3. Click OK to apply the changes.

TIP Anytime you modify the swatch used as a base color, all tints of that color update automatically.

Creating Gradient Swatches

Gradients are blends that change from one color into another. InDesign creates gradients as swatches that can then be applied to objects. *(See Chapter 6, "Styling Objects" for information on applying gradients.)*

To define a gradient:

1. Choose New Gradient Swatch from the Swatches palette menu. The New Gradient Swatch dialog box appears (39).
2. Enter a name for the gradient in the Swatch Name field.
3. Choose Linear or Radial in the Type field (40).
4. Click a color stop on the Gradient Ramp to define a color in the gradient (41).

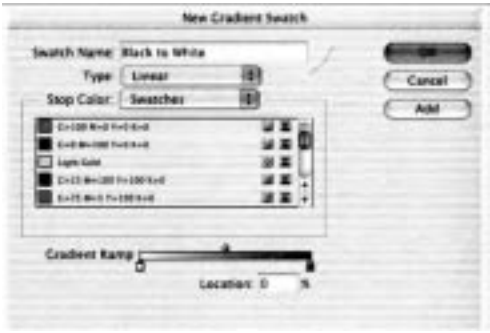
TIP You must select a color stop in order to see the Stop Color list.

5. Choose the type of color for the selected stop from the Stop Color list (42):
   - Named Color shows you the list of colors in the Swatches palette.
   - LAB, CMYK, or RGB displays the sliders that let you define the color using the LAB, CMYK, or RGB values.
6. Click the other gradient stop to define a color for it.
7. Adjust the midpoint control to change the position where the two colors blend equally.
8. Click OK to add the gradient to the Swatches palette (43).

   or

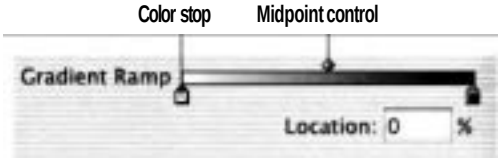
   Click the Add button to add the current gradient to the Swatches palette and continue defining additional gradients.

TIP If you don't see the gradient listed in the Swatches palette, click either the Show All Swatches or Show Gradient Swatches icon at the bottom of the Swatches palette.

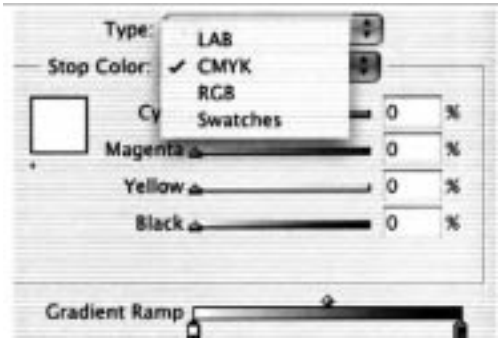


(39) *Use the* New Gradient Swatch dialog box *to define a gradient of blended colors.*

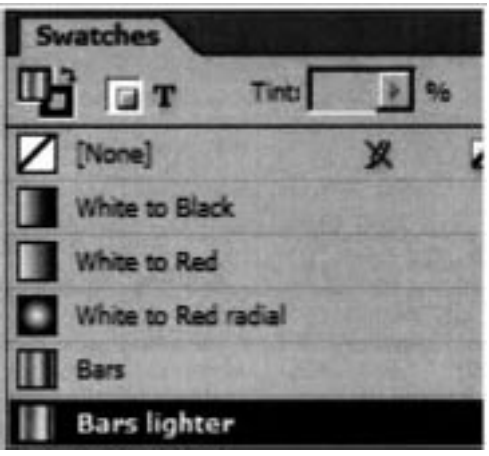
(40) *A linear gradient changes colors along a line.* A radial gradient *changes colors in a circular pattern.*



(41) *Use the* color stops and midpoint controls along the gradient ramp *to modify the gradient.*

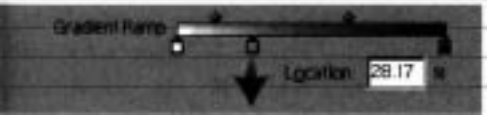


(42) *Use the* Type menu *to choose the type of colors used for each of the color stops.*



43 *Gradients are* **stored in the Swatches palette.**

44 *Click under the Gradient Ramp to add a color stop to the gradient.*



45 *Drag a color stop off the Gradient Ramp to delete that color from the gradient.*

All gradients must have at least two colors. However, you can easily add more colors to a gradient by using the ***color stops*** (points along the color ramp that introduce a new color to the gradient).

To add gradient color stops:

1. Open the New Gradient Swatch or the Gradient Options dialog box.
2. Click the area below the gradient ramp. This adds a color stop to the ramp area 44.
3. Make whatever changes you want to the color stop.
4. If necessary, move the color stop to a new position.
5. Click OK to apply the changes to the gradient swatch.

To delete a gradient color stop:

- Drag the color stop away from the ramp area and release the mouse 45. The gradient reblends according to the colors that remain.

TIP You can't have fewer than two color stops in a gradient.

To modify a gradient swatch:

1. Select the gradient swatch and choose Swatch Options from the Swatches palette menu. This opens the Gradient Options dialog box.

   or

   Double-click the gradient in the palette.

TIP Use the Preview checkbox to see how the changes affect the gradients in the document.

2. Adjust the midpoint, color stops, or gradient type.
3. Click OK to apply the changes.

Just as you can create unnamed colors, you can also create unnamed gradients. These are gradients that are created only within the Gradient palette and are not stored in the Swatches palette.

TIP Like unnamed colors, I don't recommend working with unnamed gradients.

To work with the Gradient palette:

1. If the Gradient palette is not visible, choose Window>Gradient to open the palette 16.

   or

   If the Gradient palette is behind other palettes, click the Gradient palette tab.

2. Choose Show Options from the Gradient palette menu to see **all** the controls in the palette.

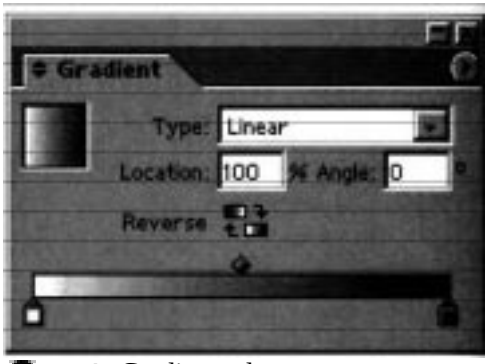
TIP If the color stops are not visible, click the area under the ramp to display the color stops in the Gradient palette.

To create unnamed gradients:

1. Use the Type pop-up list to choose between Linear or Radial.
2. Select a color stop and adjust the sliders in the Color palette to define the color at that position.

   or

   Hold the Opt/Alt key and click the name of a swatch in the Swatches palette.
3. Select another color stop and use the sliders in the Color palette to define the color at that position. *(See the exercises on page 113 to add or delete color stops.)*
4. Set the Angle of the gradient in the Angle field.
5. Click the Reverse icon to reverse the positions of the color stops.



16 *Use the* Gradient palette *to create unnamed gradients.*

Process and Spot Colors in Gradients

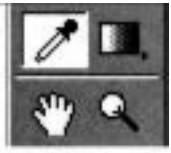
A gradient that's defined using process colors is separated onto CMYK plates.

A gradient that contains two tints of the same spot color will be separated onto the single spot color plate. If you want the gradient to fade to white, create a gradient between the spot color and a 0% tint of the spot color.

You can create a gradient between two spot colors. However, to avoid moire patterns in the gradient, you must assign different screen angles to those spot colors in the Inks dialog box.

For instance, if you had a gradient of spot red to spot yellow, you would want to make sure each color had a screen angle that is 45° different from the other. Ask your print shop for details on setting the screen angles for spot colors.

A gradient that contains both spot and process colors will be separated onto both the spot and process color plates.



47 *The* **Eyedropper tool** *lets you sample colors from placed images.*

48 *The* Eyedropper tool *can sample colors from placed images.*

Once you have a defined a gradient in the Gradient palette, you can store it as a swatch.

To store an unnamed gradient:

1. Create the gradient in the Gradient palette.
2. Click the New Swatch icon in the Swatches palette.

   or

   Drag the preview of the gradient from the Gradient palette into the Swatches palette.
3. Double-click the name of the gradient in the Swatches palette to rename it.

Using the Eyedropper

The Eyedropper tool lets you sample colors from graphics that are placed in your document. *(See Chapter 8, "Imported Graphics" for more information on placing graphics.)*

To sample and store colors from placed graphics:

1. Click the Eyedropper tool in the Toolbox 47.
2. Move the eyedropper cursor over the color of a placed graphic 48.
3. Click to sample the color.

TIP If you have already used to Eyedropper to sample a color, hold the Opt/Alt key to sample a new color.

4. Click the New Swatch icon in the Swatches palette. The sampled color is stored as a color swatch.

TIP The eyedropper samples the color in the same color mode as the placed graphic. So RGB images yield RGB colors; CMYK images yield CMYK colors.

TIP The Eyedropper can also sample and apply fills, strokes, and transparency attributes of objects and text formatting. *(See Chapter 6, "Styling Objects," and Chapter 14, "Automating Text.")*

Overprinting Colors

Overprinting is a technique that allows you to set the color of one object to mix with any colors underneath. For instance, without overprinting, a yellow object placed over a blue background knocks out the blue and prints as yellow. But with overprinting turned on, the yellow object mixes with the blue background to create green.

49 ***Use the*** Attributes palette ***to set an object to overprint.***

To set a fill or stroke to overprint:

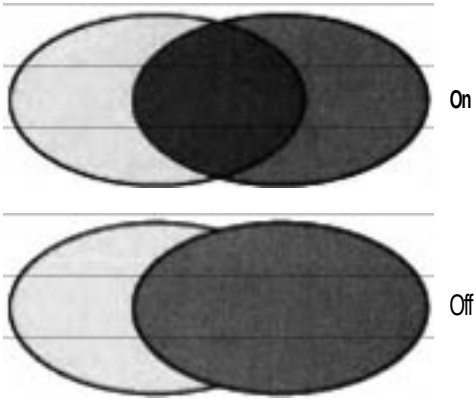
1. Select the object.
2. If the Attributes palette is not visible, choose Window > Attributes to open the palette **49**.

   or

   If the Attributes palette is behind other palettes, click the Attributes palette tab.
3. Check Overprint Fill to set the object's fill color to overprint.
4. Check Overprint Stroke to set the object's stroke color to overprint.
5. Check Overprint Gap to set the color of the gap applied to stroke effects to overprint ***(see page 147 for how to apply a gap color to strokes).***

TIP Check Nonprinting in the Attributes palette to set an object not to print. This is helpful if you want to add comments for production use that aren't meant to be seen in the finished piece.

In the past, the only way to see the effects of setting an object to overprint was to wait until the object was separated and printed by a commercial printer. InDesign lets you see a simulation of overprinting onscreen.



50 ***Turn on the*** Overprint Preview command ***to see the effects of overprinting onscreen.***

To turn on the overprint preview:

- Choose View > Overprint Preview. InDesign shows the effects of those colors set to overprint **50**.

Rules of Overprinting

You may come across a situation where the overprint preview doesn't seem to work. Most likely there is nothing wrong with the preview—it's how the color values were defined.

The rules of overprinting state that a color only overprints if it *doesn't share a common plate* with the color below. So, 100% cyan will overprint with 100% yellow to form green; however as soon as you add any percentage of yellow to the cyan, then the top color no longer overprints the bottom.

STYLING OBJECTS 6

Here's where you get a chance to express your creativity. Styling refers to applying fills, strokes, gradients, and effects to frames, lines, and text. If you're bored with plain black text on a white background, InDesign lets you change the text and background colors to almost anything you can imagine.

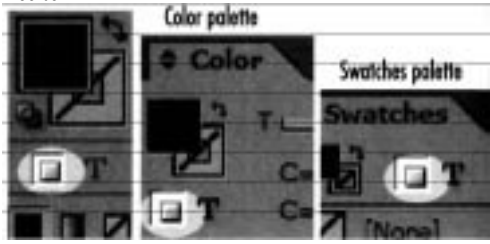
Most other programs let you style objects and text with fills, strokes, and gradients. InDesign certainly does also.

However, InDesign has broken new ground in offering sophisticated effects such as transparency, drop shadows, and glows. These are the effects that art directors and designers could only dream about creating with other page-layout programs.

With InDesign, they can make those dreams a reality.

Applying Fills

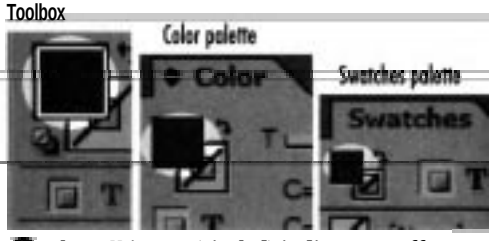
Fills are the effects applied to objects, which can be the interior of frames or text within a frame. So you can apply one color fill to the text inside a frame and another color fill to the frame itself. A fill can be a solid color or a gradient. *(See Chapter 5, "Working in Color" for more information on defining colors and gradients.)*



❶ *The* Container icons *(circled) indicate an effect will be applied to an object, not text.*

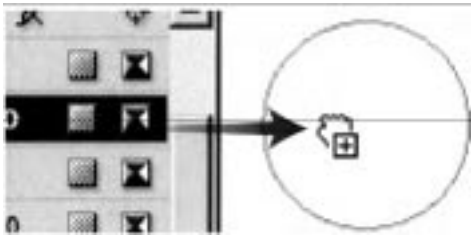
To apply a fill to an object:

1. Select an object.
2. Make sure the Container icon is chosen in the Toolbox or the Swatches or Color palette ❶. This indicates that the object will be modified.
3. Click the **Fill** icon in the Toolbox or the Swatches or Color palette ❷.
4. Choose a color or gradient in the Color, Gradient, or Swatches palettes.



❷ *The* Fill icons *(circled) indicate an effect will be applied inside an object.*

You don't have to select an object to apply a fill. You can just drag a swatch onto any object to apply a color or a gradient.

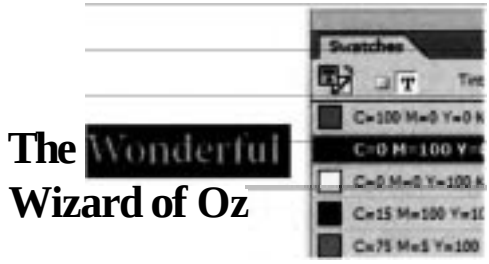


❸ *You can drag a swatch inside an object to apply a fill.*

To drag fill effects onto objects:

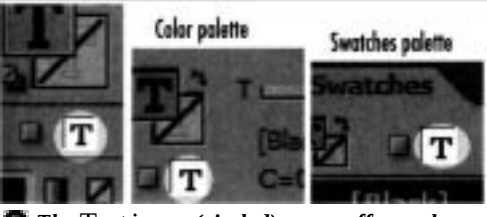
1. Drag a gradient or color swatch from the Toolbox or the Color, Gradient, or Swatches palettes onto the object ❸.
2. Release the mouse button when the swatch is inside the object. This fills the object with the color or gradient.

TIP If you release the mouse button when the swatch is on the edge of the object, you will apply the effect to the object's stroke *(see page 142)*.



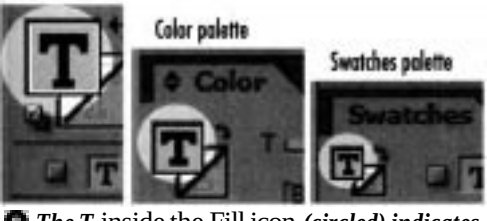
❹ *Choose a swatch to apply the color or gradient to selected text.*

Toolbox

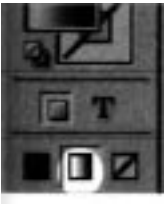


❺ *The* Text icons *(circled) set an effect to be applied to all the text within a frame.*

Toolbox



❻ *The T* inside the Fill icon *(circled) indicates that text is going to be styled.*



❼ *The* Gradient icon *in the Toolbox indicates that a color or gradient will be applied.*

❽ *The* Gradient in the Fill box *indicates that the gradient will be applied as a fill.*

You can also apply fill colors to selected text in a text frame.

To apply a fill to selected text:

1. Use the Text tool to highlight the text.
2. Click the Fill icon in the Toolbox or the Swatches or Color palette.
3. Choose a swatch in the Color, Gradient, or Swatches palette ❹.

TIP When text is highlighted, the color of the text is inverted. Deselect to see the actual text color.

You can also apply a fill to **all** the text in a frame with just the frame selected.

To apply a fill to all the text in a frame:

1. Select the text frame that contains the text to which you want to apply the fill.
2. Click the Fill icon in the Toolbox or the Swatches or Color palette.
3. Click the Text icon in the Toolbox or the Swatches or Color palette ❺.

TIP The T inside the Fill icon indicates the text will be affected, not the frame ❻.

4. Choose a swatch in the Color, Gradient, or Swatches palette.

You can also apply a gradient to text or objects.

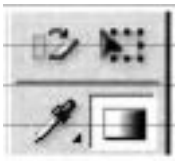
To apply a gradient fill:

1. Click the Fill icon in the Toolbox or the Swatches or Color palette with the container or text icons selected.
2. Click the gradient icon in the Toolbox ❼.

   or

   Click a gradient in the Swatches or Gradient palette. The gradient is displayed in the Fill box ❽.

Once you have applied a gradient to an object or text, you can modify how it is applied using the Gradient tool.



❾ *The* **Gradient tool** *in the Toolbox lets you modify the appearance of gradients.*

To adjust a gradient fill:

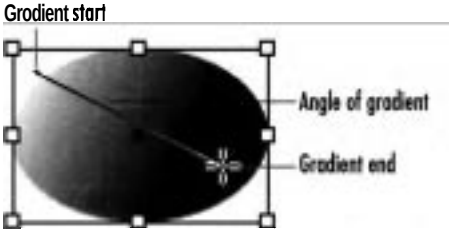
1. Select the object that contains the gradient you want to modify.
2. Choose the Gradient tool in the toolbox ❾.
3. Drag the Gradient tool along the angle that the linear gradient should follow ❿.

   or

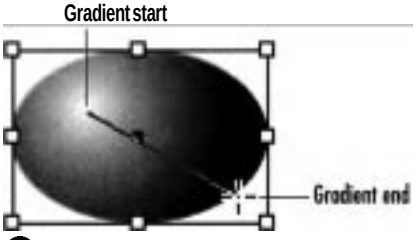
   Drag the Gradient tool to define the start and end points of a radial gradient ⓫.

TIP The start of the drag positions the first color. The end of the drag positions the final color.

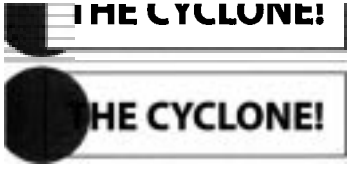
TIP You can create a 3D sphere effect by positioning the start of a radial gradient slightly off-center in an ellipse. If the center color is lighter than the outside color, the sphere appears to bulge toward the viewer. If the center color is darker than the outside color, the sphere appears to bulge away from the viewer.



❿ *Drag the Gradient tool to set the the start and endpoints and the angle of a linear gradient.*

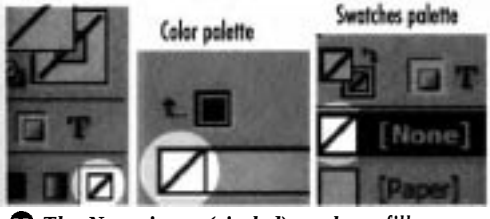


⓫ *Drag with the Gradient tool to set the start and end points of a radial gradient.*



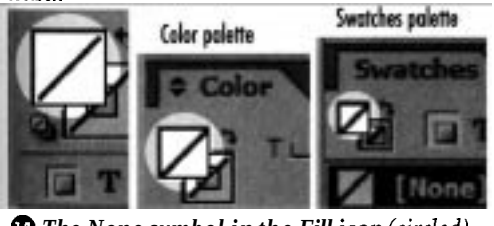
⓬ *The difference between a text frame with a white fill and a none fill.*

Toolbox

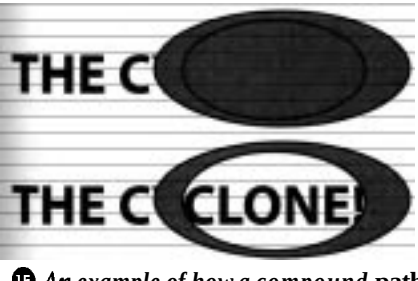


⓭ *The None icons (circled) apply no fill to an object.*

Toolbox



⓮ *The None symbol in the Fill* icon *(circled) indicates there is no fill applied to the object.*



⓯ *An example of how a compound* path *creates a hole in an object.*

You can also apply a fill of None to an object. This makes the background of the object transparent ⓬.

To apply a fill of None:

1. Select the object.
2. Click the None icon in the Toolbox or the Swatches or Color palette ⓭.

TIP If the object is not in front of others, you may not see a difference between a white and none fill. Check the icon to be sure ⓫.

Another way to style objects is to create a compound path. **A** compound path allows one path to punch a hole in another. This makes the inside path transparent while the outside path is solid ⓯.

TIP Compound paths are also used as part of the Pathfinder commands which allow you to combine and intersect objects (see ***page*** 163).

To create a compound path:

1. Select two paths that overlap.
2. Choose Object >Compound Paths >Make.

TIP If the second object is not completely contained inside the first, the hole appears only where the objects overlap.

TIP Compound paths must contain the same fill and stroke effects.

You can release a compound path back to separate objects to restore the inside path to a solid color.

To release a compound path:

1. Select compound path.
2. Choose Object >Compound Paths > Release.

Applying Stroke Effects

Strokes are the effects applied to the edge of objects and text, or along lines.

TIP In QuarkXPress, stroke effects are called frames or line effects.

To apply a stroke to an object:

1. Select the object.
2. Make sure the Container icon is chosen in the Toolbox or the Swatches or Color palette ❶. This indicates that the object will be modified.
3. Click the Stroke icon in the Toolbox or the Swatches or Color palette ⓰.
4. Choose a swatch in the Color, Gradient, or Swatches palette.

You can also apply a stroke color by dragging a swatch onto the edge of any object on the page.

To drag stroke effects onto objects:

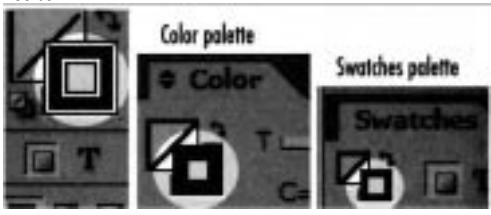
1. Drag a gradient or color swatch from the Toolbox or the Color, Gradient, or Swatches palette onto the edge of the object.
2. Release the mouse button ⓱. This applies the color or gradient to the stroke.

TIP If you release the mouse button when the swatch is inside the object, you apply the effect to the object's fill *(see page 138)*.

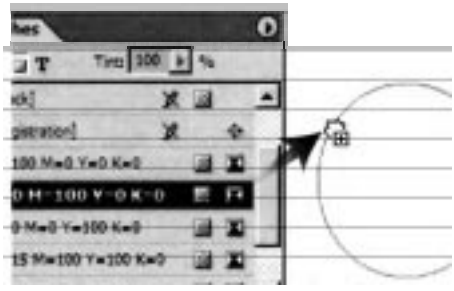
InDesign makes it easy to swap the fill and stroke colors applied to an object.

To swap the fill and stroke settings:

- Click the double-headed arrow in the Toolbox ⓳. This switches the colors of the fill and stroke applied to the object.



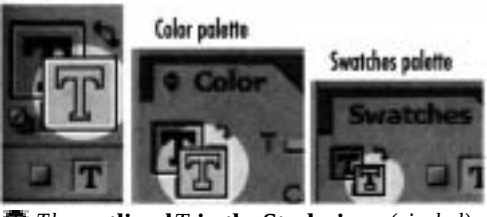
⓰ *The* Stroke icons *(circled) set an effect to be applied to the outside of an object or text.*



⓱ Drag a swatch onto the edge *to apply a stroke effect to an object.*

⓳ *Click the* Swap Fill and Stroke icon *in the Toolbox to switch the settings.*

18 *A stroke effect applied to text.*



19 *The* **outlined** *T* **in the Stroke icon** *(circled) indicates that a stroke has been applied to text.*

20 *The effect of a linear gradient applied as a stroke with three different types of fills.*

Permission to Stroke Text

If you have worked with other desktop publishing programs, you may have found that strokes applied to text deform the shape of the characters. This happens because the stroke is applied on both the outside and the inside of the text. As a result, most teachers like me warned our students never to add a stroke to text—not in headlines and never in body copy.

InDesign, however, only places strokes on the outside of text. This means that it does not distort the characters. So you have complete permission to stroke headline text in InDesign. (Body text is too small to stroke.)

You can also add a color or gradient stroke to the outside edges of text with a color or gradient 19.

To apply a stroke to selected text:

1. Use the Text tool to highlight the text.
2. Click the Stroke icon in the Toolbox or Color palette 10.
3. Choose a swatch in the Color, Gradient, or Swatches palette.

To apply a stroke to all the text in a frame:

1. Select the text frame that contains the text to which you want to apply the stroke.
2. Click the Text button in the Toolbox or Color palette.
3. Click the Stroke icon in the Toolbox or Color palette.
4. Choose a swatch in the Color, Gradient, or Swatches palette.

You can also apply a gradient as a stroke to text or objects.

To apply a gradient stroke:

1. Click the Stroke icon in the Toolbox or the Swatches or Color palette.
2. Click the Gradient icon in the Toolbox or the Swatches or Gradient palette.
3. Use the Gradient tool to modify the angle or length of the gradient applied to a stroke (seepage *140)*.

TIP **A** linear gradient applied as a stroke creates a beveled effect. This may be combined with a solid or gradient fills for 3-dimensional effects 21.

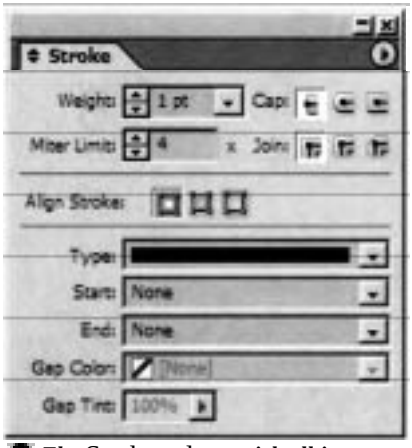
Color is only one aspect of a stroke effect. The Stroke palette controls the rest of the stroke attributes.

To work with the Stroke palette:

- If the Stroke palette is not visible, choose Window >Stroke to view it (22).

  or

  If the Stroke palette is behind other palettes, click the Stroke palette tab.



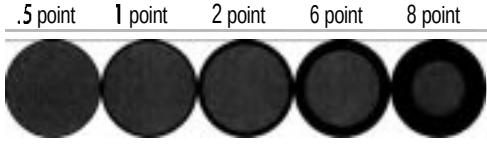
(22) ***The*** Stroke palette ***with all its options displayed.***

One of the most important attributes of a stroke is its thickness. This is controlled by changing the stroke weight (23).

To set the stroke weight (thickness):

1. Select the object.
2. Use the weight field controls to set the thickness of the stroke (24).

TIP The stroke can be positioned on the outside, center, or inside the path using the Align Stroke controls (see page 146).



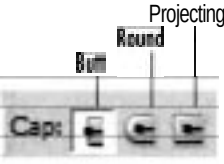
(23) ***Different*** stroke weights.

If you scale a stroked object with the Scale Strokes setting turned on in the Transform palette, the size of the stroke changes, but the stroke weight displayed stays the same. This can create objects that have half-inch thick strokes that read 1 point. You can eliminate this confusing by resetting the stroke weight so the it shows the actual thickness after scaling.

(24) ***The*** Weight controls ***let you change the stroke thickness.***

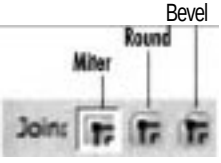
To reset the stroke weight:

1. Select the object.
2. Choose Reset Scaling to 100% from the Transform palette menu.



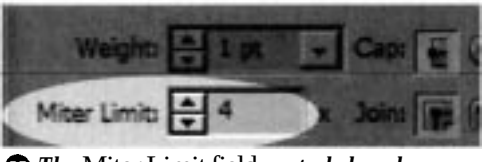
25 *The* Cap icons *control the endpoints of strokes.*

26 *The three Cap settings applied to strokes.*



27 *The* Join buttons *control how the corners of strokes are displayed.*

28 *The three Join settings applied to strokes.*



29 *The* Miter Limit field *controls how long a miter point may extend.*

A stroke's style is also controlled by the end caps and joins, which form points and corners.

To set the caps and joins:

1. Select an object that has a stroke applied to it.
2. In the Stroke palette, use the Cap icons 25 to change the way the ends of open paths are treated 26:
   - Butt ends the stroke in a square. This is the default setting for a plain stroke.
   - Round ends the stroke in a semi-circle.
   - **Projecting** ends the stroke in a square that extends out from the end point.

TIP The Cap settings have no effect on closed paths such as rectangles, ellipses, and polygons.

3. Use the Join buttons 27 to change the way two segments of a path meet at corners 28:
   - Miter joins the segments at an angle.
   - Round joins the segments with a curve.
   - Bevel joins the segments with a line between the segments.

TIP The join commands affect only corner points. *(See Chapter 7, "Pen and Beziers," for information on the types of points.)*

Sometimes a mitered join becomes too long and pointed. Fortunately you can stop the point from becoming too long by setting the miter limit.

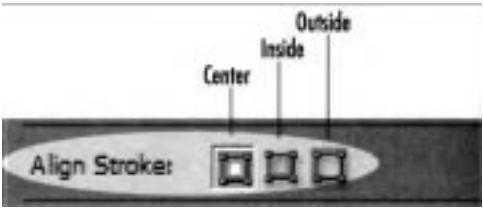
To set the miter limit:

1. Select an object with a mitered join.
2. In the Stroke palette, increase the amount in the Miter Limit field to control the size of the angle between the segments 29.

TIP If the size of the angle exceeds the miter limit, a bevel is substituted 28. It does not mean a shorter point is substituted.

In traditional drawing programs, a stroke is distributed evenly on the outside and inside of its path. InDesign lets you choose the alignment of the stroke on the path ⑩.

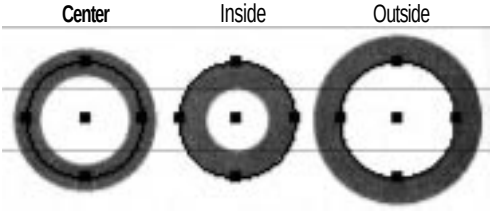
TIP This is different than the position of a stroke applied to text (see page 143).



⑩ *Set the* **Align Stroke controls** *to set the position of the the stroke along the path.*

To set the alignment of a stroke:

1. Apply a stroke to an object.
2. Choose one of the three alignment options for the stroke as follows ⑪:
   - Center aligns the stroke so that half the stroke weight is inside the path and half is outside the path.
   - Inside aligns the stroke so that the entire thickness of the stroke weight is inside the path.
   - Outside aligns the stroke so that the entire thickness of the stroke weight is outside the path.



⑪ *Examples of how the Align Stroke controls change the position of the stroke on the path.*

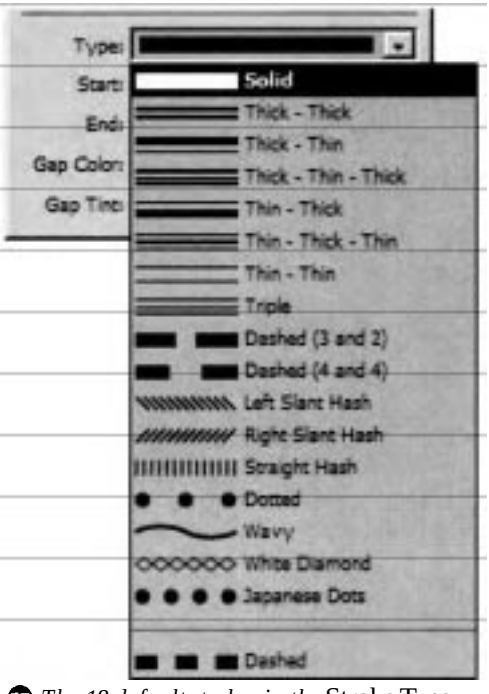
Uses for the Stroke Alignment

Most people will find they don't ever need to change the alignment options for a stroke. They use the traditional Center alignment all the time. However, for many others, the ability to specify where the stroke aligns on the path is a real benefit.

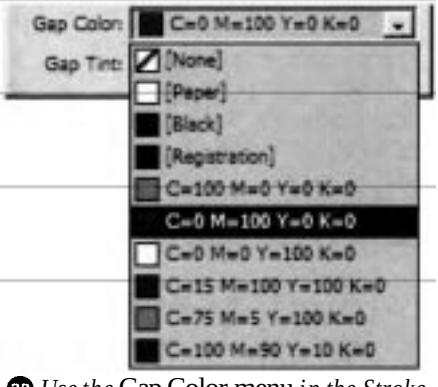
Consider if you have a placed image inside a frame *(see Chapter 8 "Imported Graphics," for more information on working with imported graphics)*. After you import the graphic, you may want to add a stroke to its frame, but you don't want the stroke to cover any part of the placed image.

If you applied a stroke with the traditional Center alignment, you would then have to enlarge the size of the frame by half the size of the stroke. By setting the stroke alignment to Outside, you ensure that the stroke does not cover any part of the image.

Or consider if you want to apply a stroke to an object without increasing its size. With the Center alignment, every time you change the stroke weight, the size of the object would increase or decrease. By setting the stroke alignment to Inside, the stroke only appears inside the object and doesn't add to the size of the object.



32 *The 18 default strokes in the* Stroke Type **menu** in *the Stroke palette.*



33 *Use the* Gap Color menu *in the Stroke palette to set the color of the clear areas of a stroke.*

34 *Use the* Gap Tint controls *to set a tint for the* ***gap*** *color.*

The default setting for strokes is a solid line. However, you can choose one of the specialty strokes such as stripes, dashes, hashes, dots, or diamonds. You can even pick a stroke that curves up and down along the path.

To apply stroke styles to strokes:

1. Apply a stroke to an object.
2. Choose one of the styles from the Stroke Type menu 32.

As described on page 142, the color of the stroke comes from choosing the stroke icon and then picking a color. This method only colors the solid portion of a stroke. For strokes such as stripes and dashes, you can also color the gap or the clear area between the solid colors of the stroke.

TIP This is the same technique used to set the gap color for the underline and strikethrough effects (see page 56).

To set a stroke gap color:

1. Choose one of the specialty strokes that has both solid and clear areas.
2. Use the Gap Color menu to choose the color for the clear areas of the stroke 33.

TIP This list contains the same colors and gradients as the Swatches palette.

3. If necessary, use the Gap Tint controls to set a screen for the gap color 34.

The stroke list contains a dashed stroke that you can customize to set the size of the dashes and the gaps between them.

To create custom dashed strokes

1. Apply a stroke to an object.
2. Choose Dashed from the Stroke Type pop-up menu. The dashed settings appear at the bottom of the Stroke palette (35).

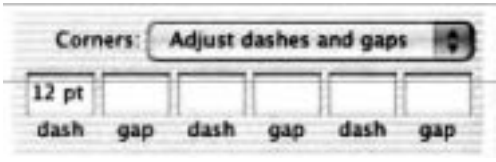
TIP The dashed settings only appear when you select the stroke style named Dashed and not the ones labeled Dashed (3 and 2) or Dashed (4 and 4).

3. Enter an amount in the first dash field for the length of **all** of the dashes in the line.
4. Enter an amount in the first gap field for the size of the space between **all** of the dashes.
5. To create a series of dashes and gaps with irregular lengths, enter other values in the rest of the dash and gap fields.

TIP Apply round caps to add round ends to the dashes.

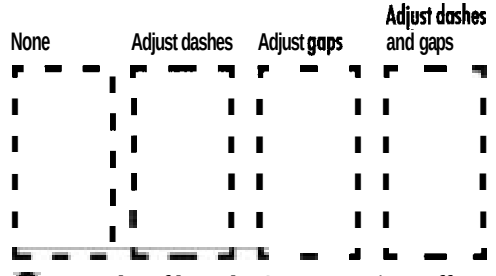
6. If necessary, use the Corners list (36) to adjust the dashes and gaps (37):
   - None leaves the dashes and gaps as they are. This can cause unequal dashes at the comers.
   - Adjust dashes changes the stroke so that the corner dashes are equal.
   - Adjust gaps changes the stroke so that the gap lengths are equal.
   - Adjust dashes and gaps changes the stroke to make the best fit so that both the corner dashes and gaps are equal.

TIP Although you can't customize them, you can also choose one of the pre-set dashes from the Stroke Type menu:
   - Dash (3and 2) creates a dash that is **3** times the stroke weight with a gap that is 2 times the stroke weight (38).
   - Dash **(4** and **4)** creates dashes and gaps that are **4** times the stroke weight (38).

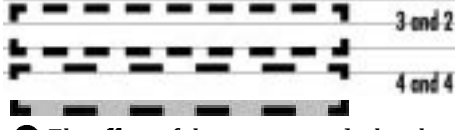


(35) *The* Dashed settings *at the bottom of the Stroke palette. These only appear when the Dashed stroke type is chosen.*

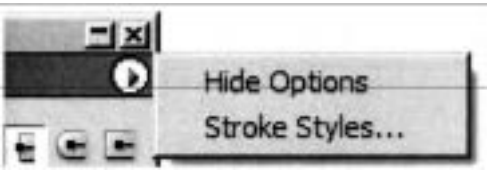
(36) *Use the* Corners menu *to adjust how dashes and gaps are distributed on a stroke.*



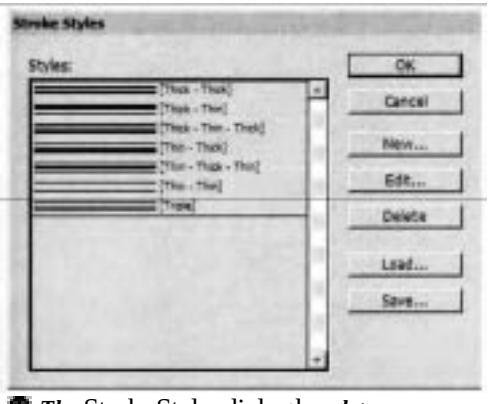
(37) *Examples of how the Corners settings affect the appearance of a dashed stroke.*



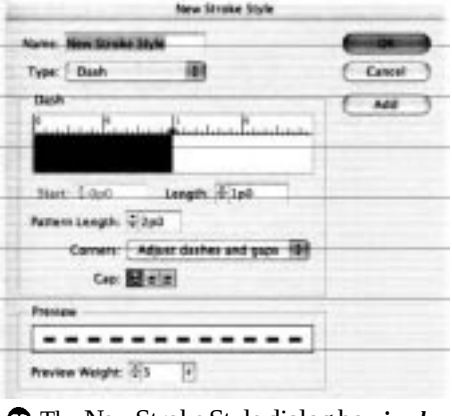
(38) *The effects of the two pre-set dash styles on 3-point strokes.*



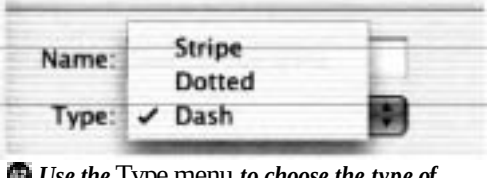
39 *Choose* Stroke Styles *from the Stroke palette to open the Stroke Styles dialog box.*



40 *The* Stroke Styles dialog box *lets you create, edit, and manage custom stroke styles.*



41 The New Stroke Style dialog box *is where you define the pattern for a custom stroke.*



42 *Use the* Type menu *to choose the type of custom stroke style.*

Creating Custom Stroke Styles

The Strokes palette menu contains a Stroke Styles feature that allows you to create custom stripes, dashes, and dots that you can add to your Strokes palette for reuse.

To create custom styles for strokes:

1. Choose Stroke Styles from the Stroke palette menu 39. The Stroke Styles dialog box appears 40.

TIP This dialog box contains the seven default stripe styles. You can't edit these default stripes, but you can use them as the basis for new stripe styles.

2. Click the New button to open the New Stroke Style dialog box 41.

   or

   Choose one of the default stripes and then click the New button. This opens the New Stroke Style dialog box with the stripe style already set as the starting pattern.

3. Use the Name field to enter a name for the custom stroke style.

4. Choose the type of stroke style from the Type menu as follows 42:
   - Stripe allows you to create multiple lines that run parallel to each other along the stroked path.
   - Dash creates a single line that is broken into a series of individual elements.
   - Dotted creates a series of dots repeated along the path.

5. The dialog box changes its controls according to the stroke style chosen in the Type menu. The following exercises show how to set the controls for each type of stroke.

6. When you have finished setting the stroke style, click OK to create the style.

   or

   Click the Add button to create the style and then define additional styles.

To create a set the stripe controls:

1. Choose Stripe from the Type menu of the New Stroke Style dialog box. The stripe controls appear (43).
2. Click inside the Stripe area to add a stripe to the stroke.

TIP New stripes appear in the Stripe area with no width and need to be adjusted in order to appear as part of the finished stroke.

3. Drag the Start control triangle on the percentage ruler or enter an amount in the Start field to set the initial position for the stripe on the stroke (45).

TIP A setting of **0%** positions the stripe to start at the very top of the stroke width.

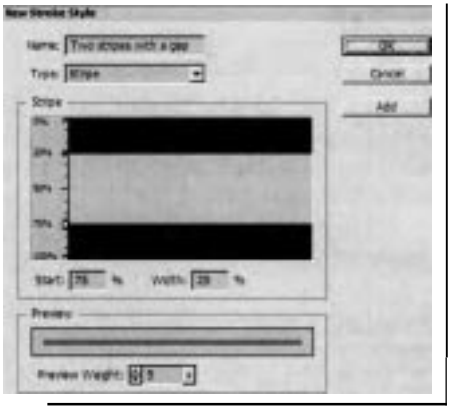
4. Drag the Width control triangle on the percentage ruler or enter an amount in the Width field to set the width of the stripe (44).

TIP The width of the stripe is a percentage of the final stroke weight of the stroke. For example, a stripe width of **50%** applied to a 4-point stroke creates a 2-point stripe.

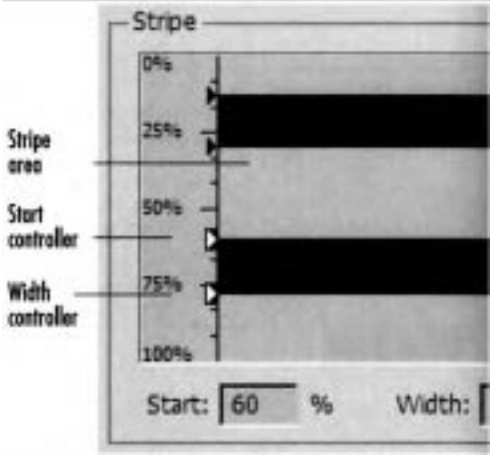
5. Drag the stripe itself up or down in the Stripe area to position it without changing its width.
6. If you need to delete a stripe, drag it up or down so that it is off the Stripe area.
7. Use the Preview control to increase or decrease the size of the preview for the stroke style (45).

TIP A larger preview helps you see small elements added to the custom stroke style. However, it does not change the appearance of the stroke used in the document.

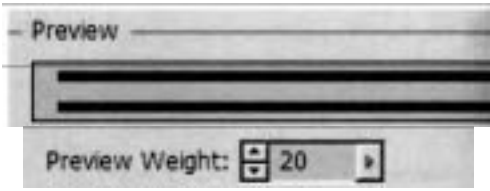
TIP See the special exercise on pages **154** and **155** for how to use striped strokes for a special knockout rule.



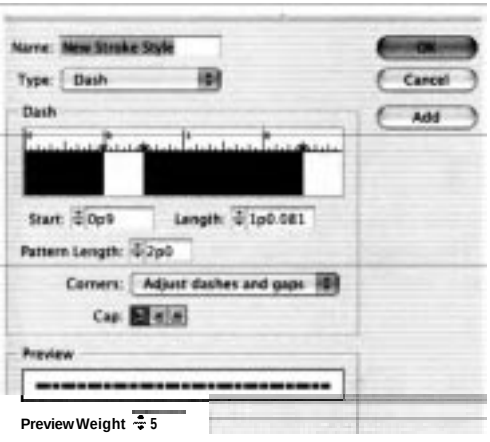
(43) ***The*** New Stroke Style dialog box ***set for the*** Stripe controls.



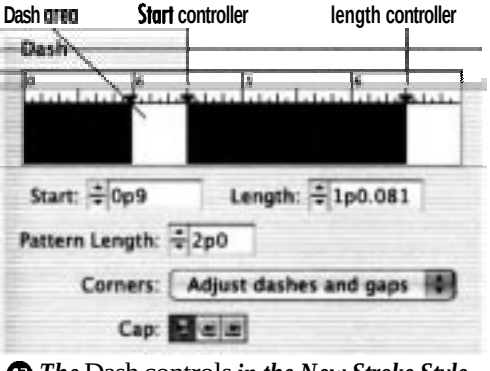
(44) ***The*** stripe controls ***in the New Stroke Style dialog box.***



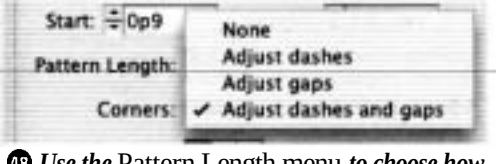
(45) ***Use the*** Preview display and Preview Weight ***to see what the stripe style will look like.***



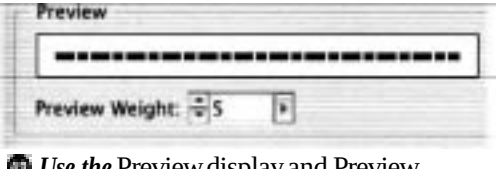
46 ***The*** New Stroke Style dialog box ***set for the*** Dash controls.



47 ***The*** Dash controls ***in the New Stroke Style dialog box.***



48 ***Use the*** Pattern Length menu ***to choose how dashes are distributed along a stroke.***



49 ***Use the*** Preview display and Preview Weight ***to see what the dash style will look like.***

To create a custom dashed stroke style:

1. Choose Dash from the Type menu of the New Stroke Style dialog box. The dash controls appear **46**.
2. Click inside the Dash area to add a dash to the stroke **47**.

TIP New dashes appear in the Dash area with no length and need to be adjusted in order to appear as part of the finished stroke.

3. Drag the Start control triangle on the percentage ruler or enter an amount in the Start field to set the initial position for the dash **47**.

TIP Unlike the Stripe controls, the length of a dash is set as an absolute amount, not a percentage of the stroke width.

4. Drag the dash itself to move it without changing its width.
5. Use the Pattern Length field to increase the length of the space that the dashes repeat within **47**.
6. If you need to delete a dash, drag it up or down so that it is off the Dash area.
7. Use the Corners list to choose how the dashes should be arranged around corners **10**. ***(See page 148 for a complete description of the Corners choices and their appearances.)***
8. Choose a Cap style to set how the dashes appear on the stroke. ***(See page 145 for a complete description of the Cap style choices.)***
9. Use the Preview control to increase or decrease the size of the preview for the stroke style **49**.

To create a custom dotted stroke style:

1. Choose Dotted from the Type menu of the New Stroke Style dialog box. The dotted controls appear (50).
2. Click inside the Dotted area to add a dot to the stroke (51).
3. Drag the Center control triangle on the ruler or enter an amount in the Center field to set the initial position for the dot (51).
4. Use the Pattern Length field to increase the length of the space that the dots repeat within (51).
5. If you need to delete a dot, drag it up or down so that it is off the Dotted area.
6. Use the Comers list to choose how the dots should be arranged around corners (52).

TIP Unlike the choices for dashes, the Corners list for dots only allows you to adjust gaps as the dots themselves cannot change their length. ***(See page 148 for a complete description of the Corners choices and their appearances.)***

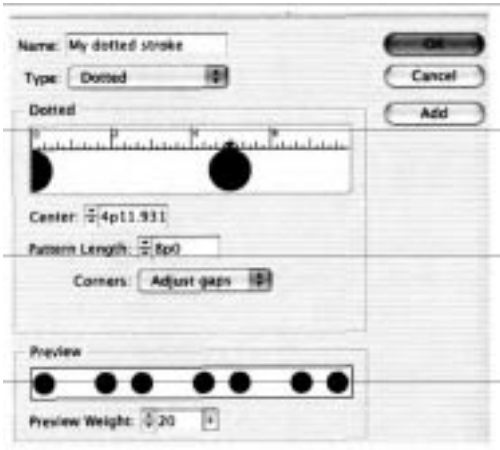
7. Use the Preview control to increase or decrease the size of the preview for the stroke style (53).

To edit a stroke style:

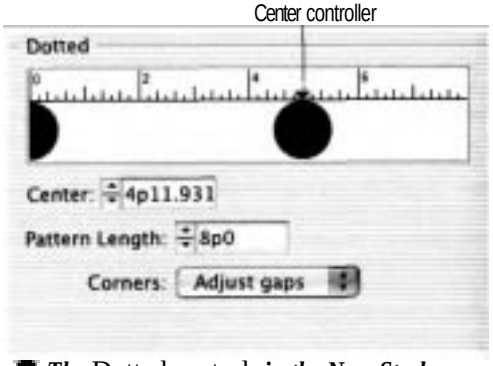
1. Select the custom stroke style in the Stroke Styles dialog box and choose Edit. The Edit Stroke Style dialog box appears.

TIP The Edit Stroke Style dialog box is the same as the New Stroke Style dialog box except that there is a Preview button to help you see what your changes do to the stroke (50). Also, the Edit Stroke Style dialog box does not have an Add button.

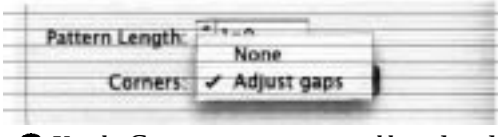
2. Click **OK** to apply the changes.



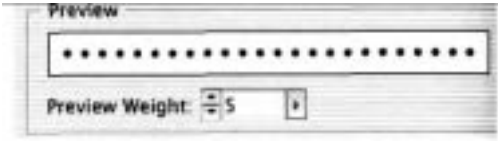
50 *The* New Stroke Style dialog box *set for the* Dotted controls.



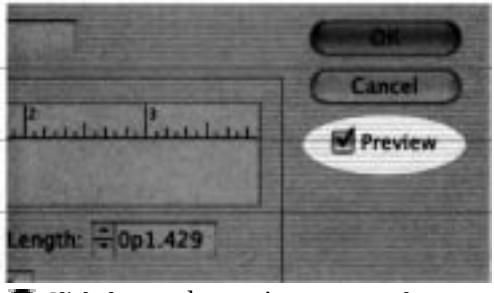
51 ***The*** Dotted controls ***in the New Stroke Style dialog box.***



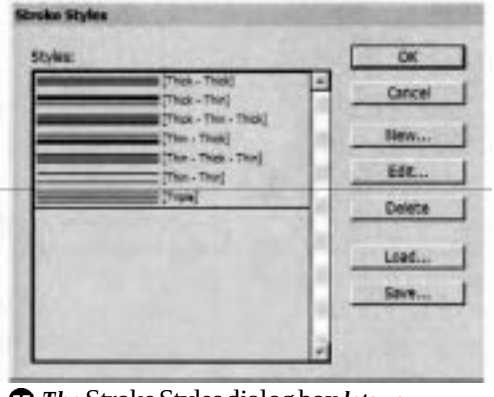
52 ***Use the*** Corners menu ***to control how dotted styles are applied to corners.***



53 ***Use the*** Preview display and Preview Weight ***to see what the dotted style will look like.***



54 *Click the* panel menu icon *to open the menu for the active panel.*



55 *The* Stroke Styles dialog box *lets you create, edit, and manage custom stroke styles.*

Once you have defined a stroke style it appears in the Type menu of the Stroke palette for that document. You may want to transfer strokes from one document to another. You do so using the Stroke Styles dialog box 55.

To save strokes for use in another document:

1. Choose Stroke Styles from the Stroke palette menu.
2. Select the custom strokes that you want to transfer to another document.

TIP Hold the Shift key to select a range of strokes.

TIP Hold the Cmd/Ctrl key and click to select non-contiguous strokes.

3. Click the Save button. A dialog box appears where you can save the strokes as an .inst file which contains the custom stroke definitions.

To transfer strokes from another document:

1. Choose Stroke Styles from the Stroke palette menu.
2. Click Load from the Stroke Styles dialog box.
3. Navigate to find the .inst file that contains the custom stroke definitions.
4. Click the Choose (Mac) or Open (Win) to add the strokes to the document.

TIP You can copy and paste objects that contain a custom stroke from one document to another. This adds the custom stroke to the Stroke palette.

To delete a stroke from document:

1. Choose Stroke Styles from the Stroke palette menu.
2. Select the stroke or strokes you want to delete.
3. Click the Delete button.

TIP You can't delete the seven default strokes.

My Favorite Use for Custom Strokes

You have no idea how excited I am to see custom strokes in InDesign. This was one of the features I have wanted in the program since it first was released. Here is a little lesson that explains my favorite way to use custom strokes and shows why this seemingly small feature is so important.

Look at the illustration in figure 96. Notice how the callout lines indicating the eye and button get lost as they move over the dark areas of the image. That's a real problem for people who do lots of book illustrations.

In the old days of pasteboard mechanicals we used to have special striped rules that were black with a white line on either side. What I need today is a way to create that look electronically.

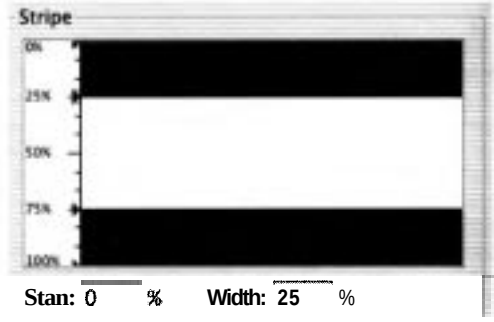
One of the ways I fixed this before InDesign CS was to create two rules. I started with a half-point black rule. I then copied the black rule, pasted the copy behind it, and set the copy to 1-point with a white stroke. This gave me a half-point rule with a quarter-point white stroke on either side.

The white stroke became the knockout that helped keep the black from getting lost. Unfortunately the technique was cumbersome and very awkward to work with if I had to move objects. Eventually it became so difficult to work with the multiple rules, that I gave up altogether.

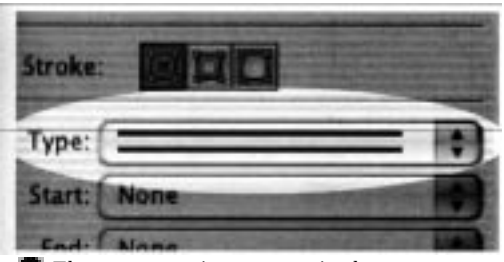
Now look at the illustration in figure 97. See how much easier it is to follow the callout across the image. That's because there's a special custom stroke applied to the rules in InDesign CS.

96 *Notice how the black* ***callout*** *rules get lost as they pass over the dark areas of the image.*

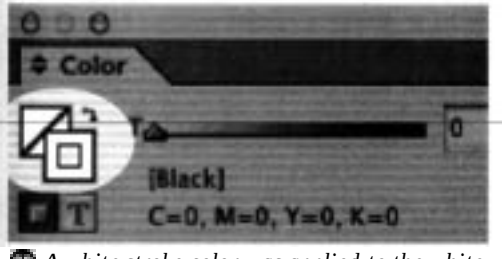
97 *Notice how a white line on either side* ***of*** *the black rule makes it easier to follow the rule as* ***it*** *passes over the dark areas of the image.*



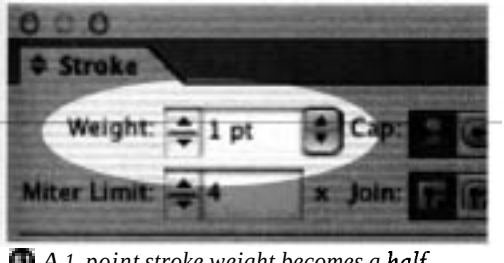
98 *Two stripes that take up 25% of the stroke width leave a 50% gap.*



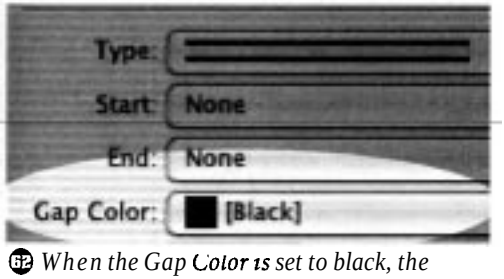
59 *The custom stripe appears in the type menu in the Stroke palette.*



60 *A white stroke color was applied to the white stripes of the custom stroke.*



61 *A 1-point stroke weight becomes a half-point gap color for the custom stroke.*



62 *When the Gap Color is set to black, the custom stripe shows a black line with two white stripes.*

Here's how I created it. I made a custom stroke style which consists of two 25% stripes on either side of a 50% gap as seen in figure 58. I saved this custom stroke.

I drew the callout rules in the layout and applied the custom stroke from the Type menu in the Stroke palette 59.

I set the stroke color as white 60. Since the two stripes are set for 25% of the stroke width, I set the stroke weight to 1 point 61. That made each side of the white knockout a quarter of a point.

I then needed to set the gap color in the Stroke palette to black 62. Since the gap had been set for 50% of the stroke width, that made the black gap a half-point width.

The benefits of this custom stroke are great. I only need to draw one object to apply two colors. And I can use this custom stroke for straight line rules as well as curves, rectangles, or any object that has to pass over multiple colors.

In case you're wondering, I could have also defined the stroke as a single 50% stripe with two 25% gaps on top and bottom. In that case I would have used a black stroke with a white gap.

Finally, in the interest of full-disclosure, you're probably wondering why you don't see examples of these special custom strokes applied to the callout lines in this book. That's because while I use InDesign to layout all my work, this book was produced using InDesign 2. The reason? InDesign CS was still in beta when I wrote and laid out this book, and I have a rule not to use beta software for critical work. I can't wait for the next edition of the book, though.

Adding Arrows and Corner Effects

You can add arrowheads and other shapes to the open-ended objects that have strokes applied to them 63.

To add arrowheads and end shapes:

1. Select an object with open ends.
2. Add a graphic to the beginning of the object, by choosing a shape from the Start menu in the Stroke palette 64.
3. Add a graphic to the end of the object, by choosing a shape from the End menu.

InDesign can modify the shape of objects by adding special corner effects. You can apply these effects to any object that has corner points—even open-ended objects.

TIP You can change a star's points to curves by applying a rounded corner effect. Or you can convert a L-shaped line into a soft curve.

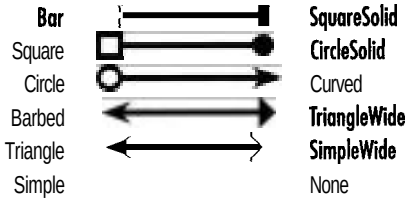
To apply corner effects:

1. Select an object with corner points.
2. Choose **Object >Corner Effects.** The Corner Effects dialog box appears 65.
3. Choose one of the effects from the Effect menu.
4. Set the size of the effect.

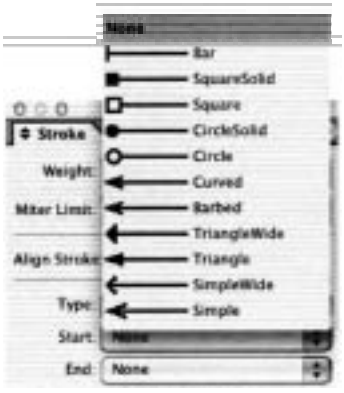
TIP Check Preview so you can see how the settings look.

5. Click OK to apply the settings 66.

TIP You can change corner effects later by selecting the object and reopening the dialog box. However, the individual points within the effect cannot be manipulated.

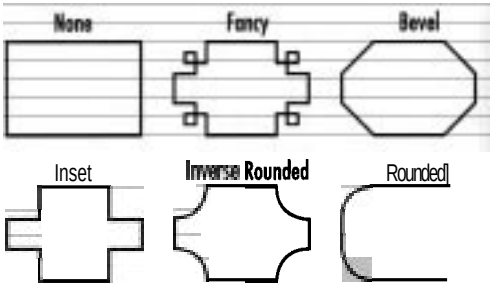


63 *The twelve different types of* arrowhead styles *for paths.*

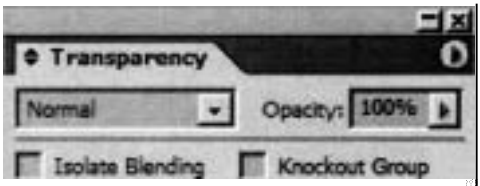


64 *Choose an arrowhead style from the* Start *or* End menus *in the Stroke palette.*

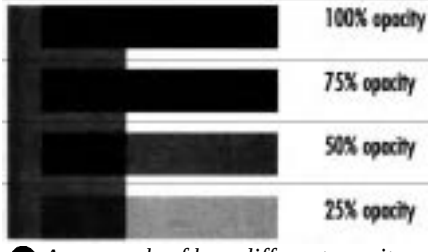
65 *The* Corner Effects dialog box *lets you apply different corners to objects.*



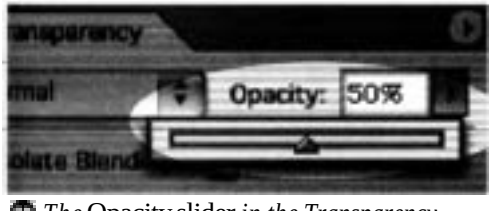
66 *An example of applying the special corner effects to rectangles.*



67 *The* Transparency palette *controls the object's opacity and its interaction with other objects.*



68 *An example of how different opacity settings change the display of an objectfilled with black.*



69 *The* Opacity slider *in the Transparency palette lowers the visibility of objects.*

70 *An example of how a whiteframe set to 50% opacity creates a ghost area in the image.*

Applying Transparency

When designers have requested transparency, all they thought about was seeing through objects. InDesign offers much more in its Transparency controls. The command center of **all** the transparency controls in **InDesign** is located in the Transparency palette.

To open the Transparency palette:

- Choose Window >Transparency to open the palette 67.

  or

  If the Transparency palette is behind other palettes, click the Transparency palette tab.

Ever since desktop publishing began, designers have requested some way to see through one object to the others behind it. One way to do this is to reduce the opacity, or increase the translucence, in an object 69.

To reduce an object's opacity:

1. Select the object that you want to see through.
2. Use the Opacity slider in the Transparency palette to reduce the visibility of the object 69.

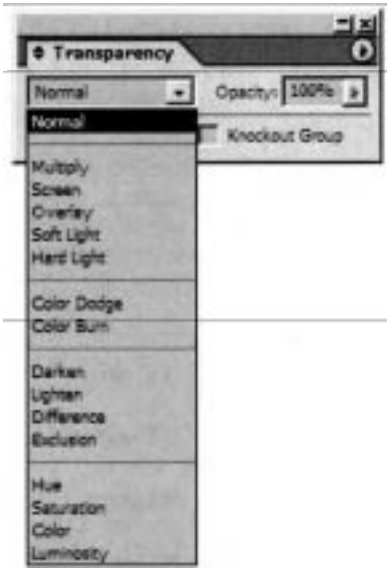
TIP Once you have **activated** the Opacity field or slider, you can use the up and down arrow keys on the keyboard to increase or decrease the amount of opacity.

TIP Place a white frame at a reduced opacity over an image to "ghost" that area in the image 70. You can then add a text frame over the ghosted area. *(See the sidebar on page 162 as to why you need to add a separate* ***text frame*** *over the ghosted area.)*

If you've used Adobe Photoshop, you should be familiar with the Blend Mode menu. This feature allows the colors and shades in one object to interact with the objects below.

To add a blend mode to objects:

1. Select the object that you want to interact with the objects below it.
2. Choose a blend mode from the list in the Transparency palette ⓫. ***(See the opposite page for a description and display of the blend modes.)***



⓫ ***The*** Blend mode menu ***lets you change the interaction between objects.***

As you apply a blend mode or an opacity setting, you may need to control how the transparency is applied. One such control is called a ***knockout group.*** Objects in a knockout group display their blend modes or opacity settings on other objects, but not with each other ⓬.

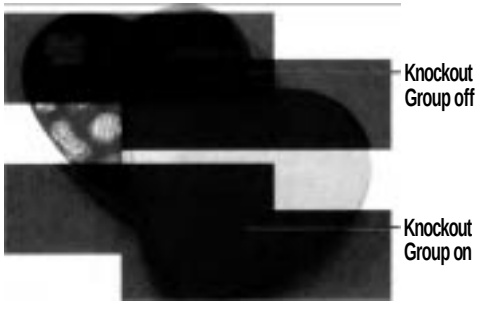
To create a knockout group:

1. Apply a blend mode or opacity setting to an object.
2. Repeat for any additional objects.

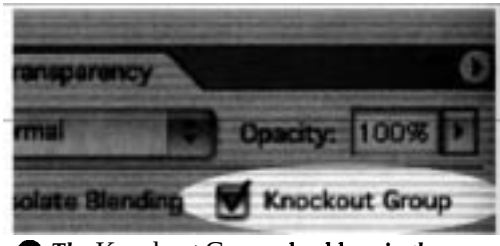
TIP Each object can have its own blend mode or opacity setting, or they all can have the same settings.

3. Use the Selection tool and select the objects that have the blend mode or opacity settings applied. These are the objects you ***don't*** want to interact with each other.
4. Choose Object >Group.
5. With the group selected, click the Knockout Group checkbox in the Transparency palette ⓭.

TIP If the Knockout Group checkbox is not visible, click the palette tab or choose Show Transparency Options from the Transparency palette menu.



⓬ ***With the*** Knockout Group ***turned on, blended objects do not interact with each other.***



⓭ ***The*** Knockout Group checkbox ***in the Transparencypalette changes the interaction of grouped objects between each other.***

An example of how the sixteen blend modes interact when placed over an image.

Understanding the Blend Modes

The best way to understand the blend modes is to experiment and explore by applying them to objects. Here's a quick rundown of how they work .

- **Multiply** multiplies the bottom color with the top color.
- **Screen** is the inverse of Multiply.
- **Overlay** preserves the highlights and shadows of the base color while mixing in the top color.
- **Soft Light** is similar to shining a diffused spotlight on the artwork.
- **Hard Light** is similar to shining a harsh spotlight on the artwork.
- **Color Dodge** lightens the bottom color to reflect the top color.
- **Color Burn** darkens the bottom color to reflect the top color.
- **Darken** displays either the bottom or top color — whichever is darker.
- **Lighten** selects the bottom or top color — whichever is lighter.
- **Difference** subtracts one color from another depending on which has the greater brightness.
- **Exclusion** is similar to Difference but is lower in contrast.
- **Hue** replaces the hue of the bottom object with the hue of the top one.
- **Saturation** replaces the saturation of the bottom object with the top.
- **Color** colorizes the bottom object with the top color.
- **Luminosity** changes the bottom object's luminence with the top.

Difference, Exclusion, Hue, Saturation, Color, and Luminosity modes do not blend spot colors, only process colors.

The other control for transparency is the Isolate Blending command. This creates the opposite effect of a Knockout group. With this command, the objects in the group display their blend modes with each other, but not with objects outside the group 75.

TIP The Isolate Blending command only affects the blend mode settings, not any opacity settings.

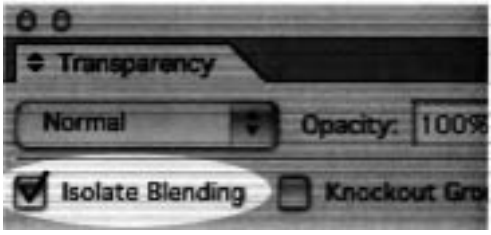
To isolate the blending in objects:

1. Apply a blend mode to an object.
2. Repeat for any additional objects.

TIP Each object can have its own blend mode, or **all** objects can have the same settings.

3. Use the Selection tool and select the objects that have the blend mode. These are the object that you *don't* want to interact with the other objects.
4. Choose Object **>Group.**
5. Keep the group selected, click the Isolate Blending **checkbox** in the Transparency palette 76. The objects in the group interact with each other, but not with other objects on the page.

75 *With the* Isolate Blending command *turned on, blended objects only interact with each other, not the objects below.*

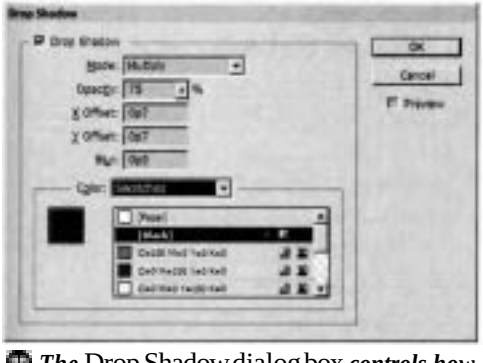


76 *The* Isolate Blending **checkbox** *in the Transparencypalette limits grouped objects to interact only with each other.*

77 *An example of a drop shadow applied to text.*

78 *An example of a drop shadow applied to text andpositioned over a placed image.*

79 *An example of a drop shadow applied to a placed image.*



80 *The* Drop Shadow dialog box *controls how shadows are applied to objects, text, and images.*

Adding Drop Shadows and Feathers

One of the most desired features in graphics programs is an automatic drop shadow that is cast behind objects, text, or images **77** – **79**. While it's been very easy to add drop shadows in Adobe Photoshop or Adobe Illustrator, it has not been easy to do so in page-layout programs — that is until InDesign.

To add a drop shadow to an object:

1. Select the object, text frame, or placed image to which you want to add a drop shadow.
2. Choose Object > Drop Shadow. This opens the Drop Shadow dialog box **80**.
3. Click the Drop Shadow checkbox. This activates the drop shadow controls.

TIP Click the Preview checkbox so you can see the effects as you change the settings.

4. Set the Mode list to choose the blend mode for the shadow.

TIP The Mode list settings are the same as the blend mode settings in the Transparency palette (see pages *158* and *159*).

5. Set the Opacity amount for how transparent the shadow should be.
6. Set the X Offset and Y Offset to create the distance between the shadow and the object.
7. Set the Blur amount for how soft the edges of the drop shadow should be.
8. Use the Color list to set a color for the shadow.

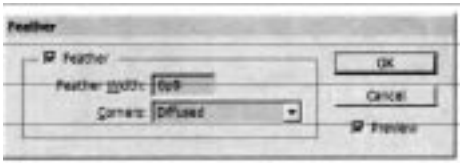
TIP You can use the Swatches list to choose named colors or switch to CMYK, RGB, or LAB colors.

9. Click OK to apply the shadow.

TIP You can't apply a shadow to just a portion of text. The effect is applied to **all** the text in the frame.

To remove a drop shadow from an object:

1. Select the object that has the drop shadow applied.
2. Choose Object >Drop Shadow. This opens the Drop Shadow dialog box.
3. Uncheck the Drop Shadow checkbox. This turns off the drop shadow effect.



81 *The* Feather dialog box *controls the softness of edges that are applied to objects, text, and images.*

Adding Drop Shadows and Feathers

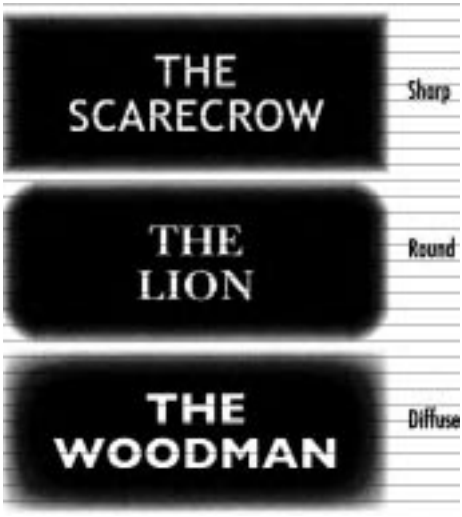
InDesign lets you apply feather commands to objects. This softens the edges of the images.

To add a feathered edge to an object:

1. Select the object, text frame, or placed image you want to have a feathered edge.
2. Choose Object >Feather. This opens the Feather dialog box 81.
3. Click the Feather checkbox. This displays the rest of the feather controls.

TIP Click the Preview checkbox so you can see the effects as you change the settings.

4. Use the Feather Width controls to set how thick the feather should appear.
5. Choose one of the settings in the Corners list as follows 82:
   - Sharp feathers by closely following the contours of the object.
   - Round feathers by rounding off any sharp corners in the image.
   - Diffuse makes the edges of the object fade from opaque to transparent. This is the same as the Feather command applied to objects in Adobe Illustrator.
6. Click **OK** to apply the feather.



82 *The* three different corner settings for *applying a feather effect.*

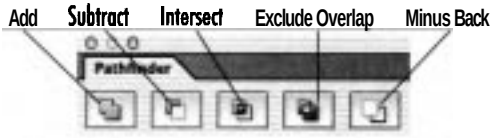
To remove a feather from an object:

1. Select the object that has the feather applied.
2. Choose Object >Feather. This opens the Feather dialog box.
3. Uncheck the Feather checkbox. This turns off the feather effect.

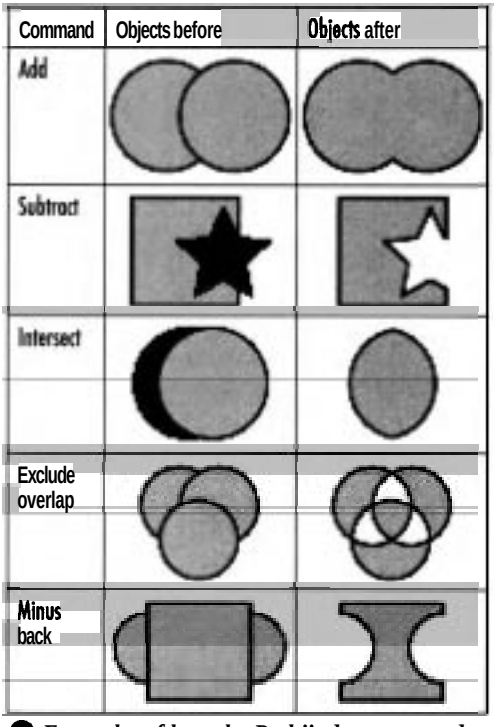
Applying Transparency and Effects

You can apply any of the transparency effects—opacity, blend modes, feather, and drop shadow—to any object including frames, image, and text frames. However, you should remember that the transparency effect will be applied to the object as a whole.

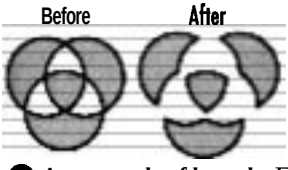
This means that if you apply an opacity setting to a frame that contains a fill color and text, the opacity will be applied to both the fill and the text.



83 *Click the five icons in the Pathfind palette to apply the Pathfinder commands.*



84 *Examples of how the Pathjinder commands change selected objects.*



85 *An example of how the* Exclude Overlap command creates separate objects *when the Compound Path is released.*

Using the Pathfinder Commands

Sometimes the easiest way to create shapes is to have one frame interact with others. For instance, rather than struggle to create a crescent moon, you can let one circle punch a hole in another. That's what the Pathfinder commands and Pathfinder palette do.

To use the Pathfinder commands:

1. Select the objects that you want to interact with each other. You must select at least two objects.
2. Click one of the Pathfinder icons in the Pathfinder palette 83.

   or

   Choose one of the following from the Object >Pathfinder menu:

   - Add combines the outer edges of the objects in a single shape 80.
   - Subtract uses the frontmost objects as cookie cutters that change the shape of the backmost object 81.
   - Intersect creates a new shape based on the area intersected by the objects 82.
   - Exclude Overlap creates a hole where the objects overlap 84.
   - Minus Back uses the backmost objects as cookie cutters that change the shape of the frontmost object 85.

Depending on the command and the position of the objects, you may create a compound path. For instance, the Exclude Overlap command always creates compound paths. If you want to separate the objects, you need to release the compound path:

To separate the results of the Pathfinder commands:

1. Select the objects created by the Pathfinder command.
2. Choose Object >Compound Paths > Release.
3. Deselect the objects and then move each one to new positions 85.

Using the Eyedropper

Imagine you've finished styling an object with exactly the right combination of fill, stroke, and transparency attributes. And now you'd like to apply those same settings to a different object. That's where the Eyedropper tool comes to the rescue. First you have to set which attributes the Eyedropper tool will sample.

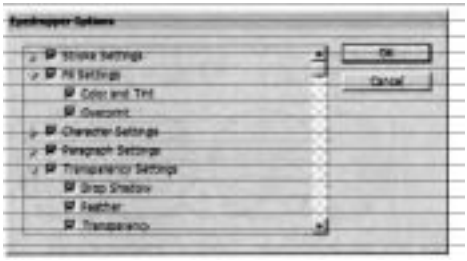
86 ***The*** Eyedropper tool ***in the Toolbox lets you sample object attributes.***

To set the eyedropper options:

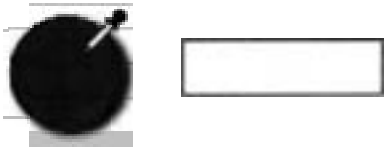
1. Double-click the Eyedropper tool in the Toolbox **86**. This opens the Eyedropper Options dialog box **87**.
2. Click the triangles to open each of the attribute categories

TIP The object settings categories are Fill, Stroke, and Transparency. ***(Seepage*** 348 ***for information on working with the text categories, character and paragraph.)***

3. Use the checkboxes to choose which attributes you want the Eyedropper tool to sample.
4. Click **OK** to set the options.

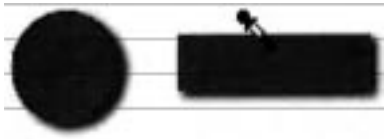


87 ***Use the*** Eyedropper Options dialog box ***to set which attributes the Eyedropper will sample and apply.***



88 ***The*** white eyedropper ***lets you sample the object attributes.***

Once you set the eyedropper options, you can sample and apply object attributes.



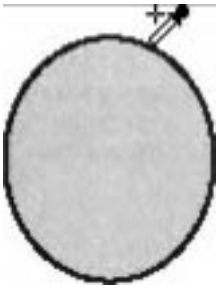
89 ***The*** black eyedropper ***applies object attributesfrom one object to another.***

To sample and apply object attributes:

1. Choose the Eyedropper tool.
2. Click the white eyedropper cursor inside the object that you want to sample **88**. The cursor changes from white to black.

TIP If an object has a stroke, but no fill, click the object's outline to sample its stroke.

3. Click the black eyedropper cursor inside the object that you want to change **89**. This applies the first object's attributes to the second.
4. Click the eyedropper inside any other objects that you want to change.



The **white precision eyedropper** *allows you to sample a specific color.*

The **black precision eyedropper** *lets you apply a specific color to either the fill or stroke.*

As you work with the Eyedropper tool, you may change your mind and want to unload one set of attributes to sample new ones.

To sample new attributes:

1. Hold the Opt/Alt key. The eyedropper cursor changes to white.
2. Click the cursor inside a new object that you want to sample.
3. Release the Opt/Alt key to apply the new setting to objects.

You may not want to sample **all** the attributes in an object—just the fill or stroke. That's when you can use the Eyedropper tool in its precision mode. The precision mode allows you to sample and apply just the color to either a fill or stroke.

To use the precision eyedropper:

1. Choose the Eyedropper tool. Hold the Shift key. A plus sign appears next to the white eyedropper cursor . This indicates that the Eyedropper tool is in the precision mode.
2. Click the precision white eyedropper cursor on the fill or stroke color you wish to sample. The cursor turns into the precision black eyedropper .
3. Click the precision eyedropper on either a fill or stroke of the object that you want to change. Only the fill or stroke is changed.

Setting Object Defaults

You can make any of the object settings the default for any new objects you create. You can set the object defaults for the current document or globally for all new documents.

92 ***Click the*** Default Fill and Stroke icon ***in the Toolbox to set the fill to none and stroke to black.***

To set current document defaults:

1. With a document open, deselect any objects.
2. Make whatever changes you want in the Stroke palette or other palettes. This sets the defaults for the open document.

To set global defaults:

- With no document open, make whatever changes you want in the Stroke or other palettes. This sets the global defaults for all new documents.

InDesign also has its own default fill and stroke setting of a black stroke and no fill. These are separate from the default you set yourself. This can be easily applied to objects.

To apply the InDesign fill and stroke defaults:

- Click the Default Fill and Stroke icon in the Toolbox 92.

PEN AND BEZIER TOOLS 7

I remember the first time I tried to use the Pen tool in a computer graphics program. I clicked the tool and dragged across the screen in the way I thought would create a simple curve. Instead, I got a wild series of lines that shot out in different directions. When I tried to change the shape of the curves, things got even worse. I was so startled I immediately closed up the program and didn't use the Pen tool for a long, long time.

However, I really wanted to use the Pen tool as I knew it was the best way to create curved shapes. So I forced myself to try the tool again. It took a lot of trial and error but eventually I was able to understand the Pen and Bezier controls. Later on, working with tools such as the Pencil and Eraser, made it even easier to work with Bezier curves.

Once I got it, I realized the principles are simple. Even better, if you have used the Pen tool in Adobe Illustrator or Adobe Photoshop, you will find InDesign's Pen tool almost the same.

I just wish someone had written out easy to understand, step-by-step instructions. So think of this chapter as the instructions for the Pen tool that I wish I had back then.

Multimedia Pen Lessons

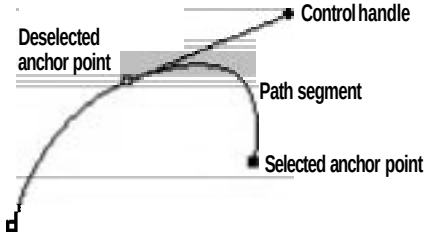
This chapter contains everything you should need to master the Pen tool in InDesign. However, if you would like to learn the Pen tool using movies and audio narration, may I suggest you visit www.zenofthepen.org. It has an online tutorial you can purchase that can help you learn the Pen tool in InDesign as well as other programs such as Adobe Illustrator.

Pen Points

One of the most important tools in any graphics program is the Pen tool. Fortunately InDesign has a Pen tool that lets you create much more sophisticated shapes in your layout than can be created with the basic shape tools. *(See Chapter 4, "Working with Objects" for more information on working with the basic shapes.)*

TIP If you are familiar with the Pen tool in Adobe Illustrator or Macromedia FreeHand, you will find it very easy to master the Pen in InDesign.

If you've never used a Pen tool in any graphics program, you will understand more if you first become familiar with the elements of paths.



❶ *The elements of a path.*

The Father of Bezier Curves

Some people call the curves created by the Pen tool *Bezier curves*. This is in honor of Pierre Bézier (*Bay-zee-ay*), the French mathematician.

Monsieur Bézier created the system of mathematics that is used to define the relationship of the control handles to the shape of the curve.

Adobe Systems, Inc., adopted this mathematical system when it created the PostScript language which is used as the basis of graphics programs. InDesign, along with many other programs, uses Bezier curves as the mathematics behind each curve.

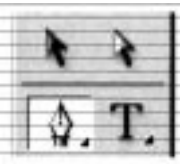
Elements of Paths

Paths are defined by points and line segments. When you draw with the Pen tool you create the following:

- Anchor points define a path at points where the path changes ❶. These can be plain corner points, smooth curve points, and corner curve points as explained on the following pages.
- Segments are the paths that connect anchor points ❶.
- Control handles extend out from anchor points; their length and direction control the shape of curves of the segments ❶.

Drawing in a Page Layout Program?

I limit using InDesign's Pen tool to simple things. If I need some sort of curved or wavy line, I use InDesign's Pen tool. For instance, all the curved arrows in this book were created with the Pen tool. However, if I want a perfect spiral, I would use Illustrator's Spiral tool. *(See Chapter 8, "Imported Graphics" for how to bring Illustrator paths into InDesign.)*

If I need to jazz up some text, I stay within InDesign. But if I need a complete map of New York State with highways, rivers, and scenic attractions, I work in Illustrator.

❷ *Click the* Pen tool *in the Toolbox to create lines.*

❸ *The* start **icon** *for the Pen tool.*

❹ *Click with the Pen tool to* create a corner point, *shown as a small square.*

❺ Straight lines *extend between the plain corner points.*

❻ *The small circle next to the Pen cursor indicates that you will* close the path.

Drawing Lines

Different types of anchor points create different line shapes. Straight lines are formed by creating *plain comer points.*

To create straight lines:

1. Click the Pen tool in the Toolbox ❷.
2. Position the cursor where the path should start. A small X appears next to the Pen which indicates that you are starting the path ❸.
3. Click. A plain corner point appears as a colored square. The Pen cursor is displayed without any symbol next to it ❹.
4. Position the cursor for the next point and click. This creates another plain corner point with a straight line that connects the first point to the second.

TIP Hold the Shift key to constrain the straight lines to 45-degree angles.

5. Continue clicking until you have created **all** the straight-line sides of the object ❺.

TIP If you have not closed the path *(see the next exercise),* hold the Cmd/Ctrl key and click with the Selection tool. This deselects the path and allows you to start a new one.

To close a path with a straight line:

1. Move the Pen over the first point. A small circle appears next to the Pen ❻. This indicates that you can close the path.
2. Click. This closes the path with a plain corner point and allows you to start a new path.

Drawing Curves

Smooth curve points create curves like the track a roller coaster follows. There are no abrupt changes from one curve to another.

To create smooth curves:

1. Drag the Pen tool where you want to start the curve. Handles extend out from the point.

TIP The length and angle of the handle control the curve's height and direction.

2. Release the mouse button.

TIP You do not see a curve until you create the next point of the path.

3. Move the cursor to where you want the next part of the curve. Drag to create the curved segment between the two smooth curve points ❼.

4. Continue to create curved segments by repeating steps **2** and **3** ❽.

To close a path with a smooth curve:

1. Move the Pen over the first point. **A** small circle appears indicating that you can close the path.

2. Drag backwards to close the path ❾.

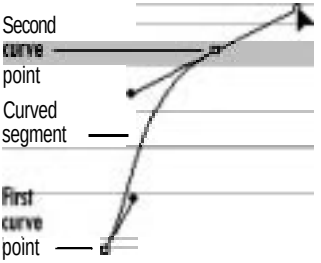
A comer curve point creates curves with an abrupt change in direction. The path of a bouncing ball illustrates a corner curve.

To create a corner curve:

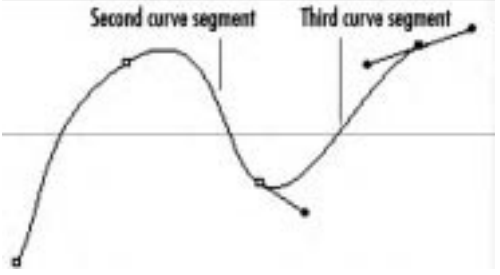
1. With the Pen tool active, drag to create an anchor point with control handles.

2. Without releasing the mouse button, hold the Opt/Alt key and then drag to pivot the second handle ❿.

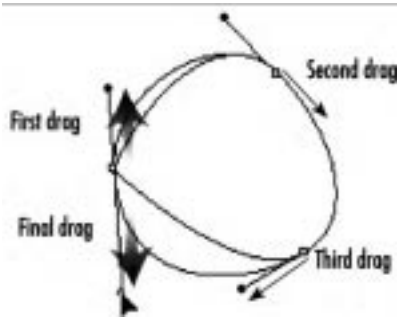
3. Release the mouse button when the second handle is the correct length and direction.



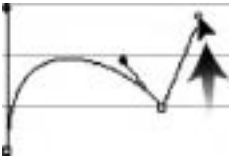
❼ ***Drag with the Pen tool to create*** smooth curves.



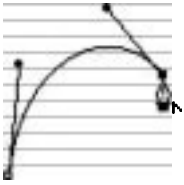
❽ ***A path with a series of curved segments.***



❾ Dragging backwards closes a path ***with a smooth curve.***



❿ Hold the **Opt/**Alt key ***to pivot the handles, which creates a corner curve.***



⓫ *Move the cursor back over a point and* **click** to retract a handle *along a curve.*

⓬ *Drag with the Pen tool over an existing anchor point to* extend a handle out *from the point.*

General Pen Rules

As you work with the Pen tool, there are some rules you should follow:

- Use the fewest number of points to define a path. Too many points add to the size of the file and make it difficult to edit the path later.
- Try to limit the length of the control handles to one-third the length of the curve. This is sometimes called the *One-Third Rule*. The One-Third Rule makes it easier to edit and control the shape of curves.

Changing Curves and Corner Points

If you retract the handle that extends out from a curve point, the next segment becomes a straight line.

To retract a handle:

1. Drag to create a smooth curve point.
2. Move the Pen cursor back over the anchor point. **A** small angle symbol appears next to the cursor.
3. Click. The handle retracts back into the anchor point. The point is now a corner point with only one handle ⓫.
4. Continue the path with either a straight line or a curved line.

TIP Click to make the next path segment straight. Drag to make the next path segment curved.

If you create a corner point with no control handles, you can extend a single handle out from that anchor point.

To extend a handle from a point:

1. Click to create a corner point with no handles.
2. Move the Pen cursor back over the anchor point you just created. A small angle symbol appears next to the cursor.
3. Drag to pull a single handle out from the anchor point ⓬.
4. Continue the path with a curved line.

Modifying Paths

Once you create a path, you can still change its shape and the position of the points. You can also split a path into two separate segments or join two segments together. When you move points, you use the Direct Selection tool.

To move individual points:

1. Click the Direct Selection tool in the Toolbox ⓭.
2. Position the tool over the point you want to move.
3. Drag the point to the new position.

To select and move multiple points:

1. Click the Direct Selection tool in the Toolbox.
2. Drag to create a rectangular marquee around the points you want to select ⓮. The selected points appear solid. The unselected points appear hollow.

   or

   Hold the Shift key as you click to select the points.

TIP You can select points in one path or multiple paths.

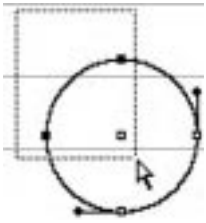
3. Drag the point to the new position.

The Direct Selection tool also lets you change the length and direction of the control handles.

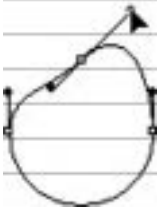
To move control handles:

1. Click the Direct Selection tool in the Toolbox.
2. Click a point on the path. This displays the control handles for that point.
3. Position the Direct Selection tool over the end point of the handle.
4. Drag the handle to the new position ⓯.

⓭ *The* Direct Selection tool *in the* ***Toolbox; use it to move*** *points.*

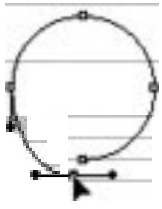


⓮ Drag a marquee to select multiple points. ***The center point does not turn black.***

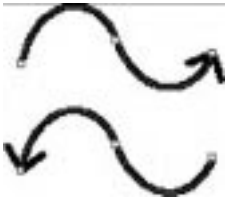


⓯ ***The Direct Selection tool*** changes the length and position ***of a control handle.***

16 ***The*** Scissors tool ***in the Toolbox allows you to snip paths in two.***



17 ***The Scissors tool*** splits a path into two points, ***one on top of the other.***



18 ***The results of applying the*** Reverse Path command ***to a path with an arrowhead.***

You may want to separate one path into two parts—for instance, to separate two halves of a circle. The Scissors tool makes it easy to split or break a path into segments.

To split paths:

1. Select the path.
2. Click the Scissors tool in the Toolbox **16**.
3. Position the cursor where you want to split the path.
4. Click to split the path at that point.

TIP The Scissors tool splits the path by creating two points, one on top of the other. Use the Direct Selection tool to move one point away from the other **17**.

TIP Paths that contain text cannot be split into two distinct segments.

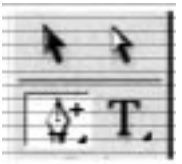
The direction of a path comes from the order in which you draw the path. You can change the direction of the path.

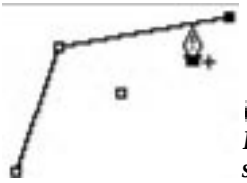
To change the path direction:

1. Use the Direct Selection tool to select the path.
2. Choose **Object** >Reverse Path. This switches the start and end points of the path **18**.

Modifying Points

So what happens if you create the wrong point with the Pen tool? Are you stuck? Does it mean you have to redraw the entire path? Thankfully, no—there are many ways to change the paths made with the Pen tool, as well as paths made with other tools. (See ***Chapter 4, "Working with Objects" for more information on working with the basic shapes.)***

A simple way to change a path is to add a point. This helps you turn one shape into another.

⑲ ***The*** Add Anchor Point tool ***in the Toolbox.***



⑳ ***The Add Anchor Point tool over a path segment.***

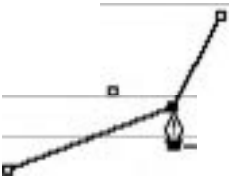
To add points to a path:

1. Select the path.
2. Choose the Add Anchor Point tool in the Toolbox ⑲.
3. Click the path where you want to add the point.

TIP The Pen tool automatically changes to the Add Anchor Point tool when positioned over a selected path segment ⑳.

㉑ ***The*** Delete Anchor Point tool ***in the Toolbox.***

You can delete points from a path without causing a break in the path.

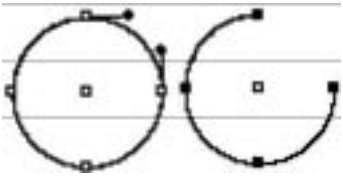


㉒ ***The Delete Anchor Point tool over a point.***

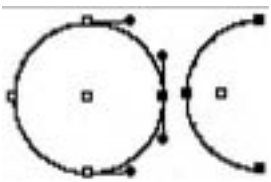
To delete points from a path:

1. Select the path.
2. Choose the Delete Anchor Point tool in the Toolbox ㉑.
3. Click to delete the point of the path.

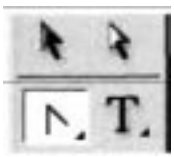
TIP The Pen tool changes to the Delete Anchor Point tool when positioned over a point on a selected path ㉒.



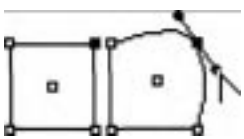
23 ***When you select and*** delete a segment, ***you keep the points on either side of the segment.***



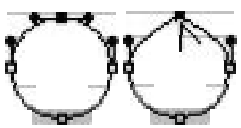
24 ***When you select and*** delete a point, ***you delete both segments that were attached to the point.***



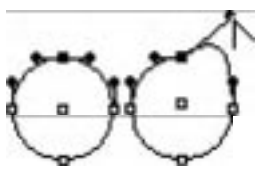
25 ***The*** Convert Direction Point tool ***in the Toolbox.***



26 ***Drag with the Convert Direction Point tool to*** change a corner point into a smooth curve point.



27 ***Click with the Convert Direction Point tool to*** change a smooth curve point into a corner point.



28 ***Drag a handle with the Convert Direction Point tool to change a*** smooth curve point into a corner curve point.

You may also want to create an open path by deleting a segment or the point between two segments.

To delete a segment in a path:

1. Use the Direct Selection tool to select the segment that you want to delete.
2. Press the Delete key or choose Edit > Clear. This deletes the segment and opens the path **23**.

TIP If you select a point with the Direct Selection tool, the two segments on either side of the point can be deleted **24**.

You can also change the control handles around an anchor point. This changes the shape of the segments controlled by that anchor point.

To modify an anchor point:

1. Select the path.
2. Choose the Convert Direction Point tool in the Toolbox **25**.
3. Use the tool as follows to change the anchor points:
   - Press and drag a corner point to create a smooth curve point with two handles **26**.
   - Click a smooth curve point to create a corner point with no handles **27**.
   - Drag one of the handles of a smooth curve point to create a corner curve point **28**.

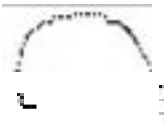
Using the Pencil Tool

Unlike the Pen tool, which uses mathematical principles to draw paths, InDesign's Pencil tool works more like a traditional Pencil. However, the Pen tool is a little more precise than the Pencil.

TIP If you are familiar with the Pencil tool in Adobe Illustrator, you will find you already know how to work with InDesign's Pencil tool.

29 *The* Pencil tool *in the Toolbox.*

30 *The X next to the Pencil cursor indicates you are about to* start a *new* path.



31 *Press and drag to create a path with the Pencil tool.*

32 *The circle next to the Pencil cursor indicates the Opt/Alt key will* close the path.

33 *Drag the Pencil tool next to a selectedpath to* reshape the path.

To draw with the Pencil tool:

1. Click the Pencil tool in the Toolbox 29. A small X next to the Pencil cursor indicates you are about to start the path 30.
2. Press and drag with the Pencil 31.
3. To close the path, hold the Opt/Alt key 32. A small *O* next to the cursor indicates the path will be closed.
4. Release the mouse to create the path.

The Pencil tool can also be used to edit existing paths and reshape paths.

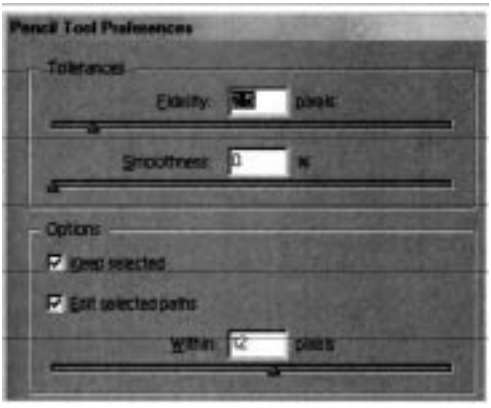
To edit paths with the Pencil tool:

1. Select the path that you want to reshape.

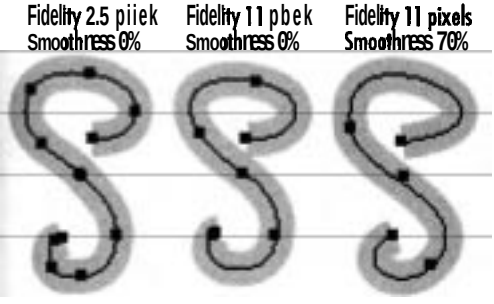
TIP The Pencil tool can edit paths created by tools such as the Pen or the frame tools.

2. Move the Pencil tool near the selected path. The X next to the cursor disappears. This indicates that you are about to edit the path.
3. Drag along the path. When you release the mouse button, the path is reshaped 33.

TIP If you don't get the results you expect, drag the Pencil tool in the opposite direction.



34 ***The*** Pencil Tool Preferences dialog box ***allows you to control the appearance of the path.***



35 ***The Pencil tool fidelity and smoothness settings change the appearance of the path.***

You can change how the Pencil tool responds to the movements of the mouse as you drag. The preferences also control how the Pencil tool edits paths.

To set the preferences for the Pencil tool:

1. Double click the Pencil tool in the Toolbox. This opens the Pencil Tool Preferences dialog box **34**.
2. Set the amount of Fidelity using the slider or field. The lower the amount of Fidelity, the more the path will follow the motions of the mouse **35**.
3. Set the amount of Smoothness using the slider or field. The higher the setting for Smoothness, the more the path will follow curved shapes **35**.
4. Check Keep Selected to keep the path selected after you have drawn it. This makes it easier to reshape the path.
5. Check Edit Selected paths to turn on the reshape option.
6. If the Edit Selected Paths option is turned on, use the slider or field to set how close the Pencil tool must come, in pixels, to the path you want to reshape.

Using the Smooth Tool

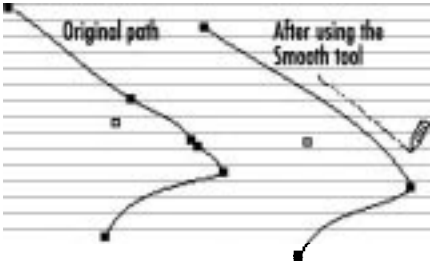
Once you have created a path, you may want to delete extra points so that the path is smoother.

TIP If you are familiar with Illustrator's Smooth tool, you will find it easy to use the Smooth tool in InDesign.

36 *The* Smooth tool *in the Toolbox.*

To smooth paths with the Smwth twl:

1. Select the path that you want to smooth.
2. Click the Smooth tool in the Toolbox 36.
3. Press and drag the Smooth tool along the path.
4. Release the mouse. The path is redrawn with fewer points 37.

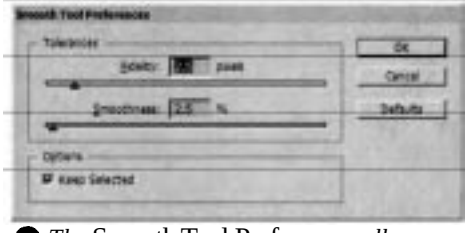


37 *Drag the Smooth tool along a path to* remove points and eliminate small bumps *and curves.*

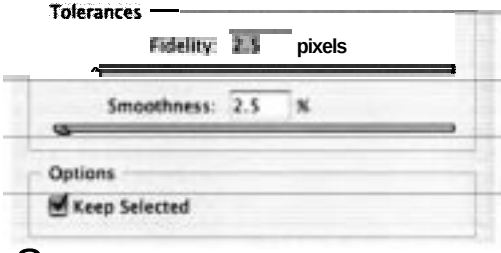
You can change how the Smooth tool responds to the movements of the mouse as you drag.

To set the preferences for the Smooth tool:

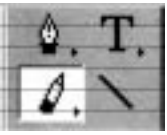
1. Double click the Smooth tool in the Toolbox to open the Smooth Tool Preferences dialog box 38.
2. Use the slider or field to set the Fidelity amount 39. The lower the amount, the more the new path will follow the original path.
3. Use the slider or field to set the Smoothness amount 40. The higher the setting, the more curved the path.
4. Check Keep Selected to keep the path selected after you have smoothed it. This makes it easier to increase the smoothness of the path.



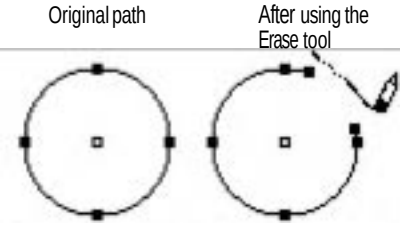
38 *The* Smooth Tool Preferences *allow you to control how much the Smooth tool affectsthe appearance ofpaths.*



a *Adjust the* sliders for the Fidelity and Smoothness *to control how the Smooth tool affects the appearance ofpaths.*



40 *The* **Erase** *tool in the Toolbox.*



41 *The Erase tool deletespoints as you drag it along a path.*

Using the Erase Tool

You may want to delete parts of paths. Rather than selecting and deleting individual points, you can use the Erase tool to drag to delete parts of a path.

TIP If you are familiar with the Erase tool in Adobe Illustrator, you will find it easy to use the Erase tool in InDesign.

To delete paths with the Erase tool:

1. Select the path that you want to delete parts of.
2. Choose the Erase tool in the Toolbox **40**.
3. Press and drag the Erase tool along the path.
4. Release the mouse to display the new path **41**.

TIP The Erase tool will always open a closed path.

TIP If you drag the Erase tool over the middle of an open path, you create two separate open paths. Both open paths will be selected.

Deleting or Removing Points: Which tools or commands do what?

You may find yourself confused by all the different tools and commands for deleting or removing points and segments.

When does the action cause a break in a path? When does an action remove points without opening the path?

See the table on the next page for a review of how points are removed from paths and the result.

Adding or Deleting Points on Paths

The following table compares the different tools and commands as to their effect when adding or deleting points on a path.

Tool or Command	Action	Result
Add Anchor Point tool	Click a segment on the path	Always adds a point to the path
Delete Anchor Point tool	Click an existing point on the path	Deletes the point. Path reshapes without any break
Erase tool	Drag along a path	Creates a break in the path
Scissors tool	Click a point or a segment	Creates two endpoints at that position. Points can then be separated to create a break in the path.
Delect command	Applied to points or segments selected with the Direct Selection tool.	If applied to a selection in the middle of a path, the command breaks the path into two segments. If applied to a selection at the end of a path, the command shortens the yath.

IMPORTED GRAPHICS 8

One reason desktop publishing became so popular is how easy it made combining graphics such as photographs and illustrations with type for layouts.

In the years before personal computers, specialized workers, toiling under the exotic name strippers, manually trimmed away the blank areas around graphics so that text could be placed around the image. (The name stripper is derived from combining strips of film together.)

Even more complicated was placing text over an illustration. The image and text had to be combined by photography and then stripped into the layout.

Certainly you expect InDesign to import images in the formats that are used by other page layout programs. But since this is Adobe InDesign, you also get some special benefits when working with other Adobe products.

Here's where you learn how to add imported artwork to your page layouts. It only takes a few clicks of a mouse to combine type and artwork together. It's enough to make old-time strippers hang up their tassels!

Placing Artwork

Most artwork that's used in InDesign comes from other sources such as scanners or digital cameras. Artwork can also be created using programs such as Adobe Photoshop, Adobe Illustrator, Macromedia FreeHand, or Adobe Acrobat. The easiest way to place artwork is to automatically create the frame that contains it when you import the artwork.

To place artwork without drawing a frame:

1. Choose File >Place. This opens the Place dialog box ❶ and ❷.
2. Navigate to find the file you want to import. *(See "File Formats" on the next page for a list of the file types you can place in InDesign.)*
3. Check Show Import Options to open the Import Options dialog box before you place the file ❸. *(See page 187 for more information on working with Import Options.)*
4. Click Choose (Mac) or Open (Win) to load the graphic into an image cursor ❹.

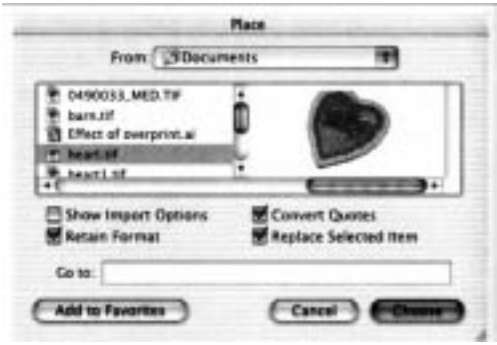
TIP Hold the Shift key as you click Choose/Open to open the Import Options dialog box, even if the option is not checked.

5. Click the cursor to place the graphic in a rectangular frame the same size as the artwork.

   or

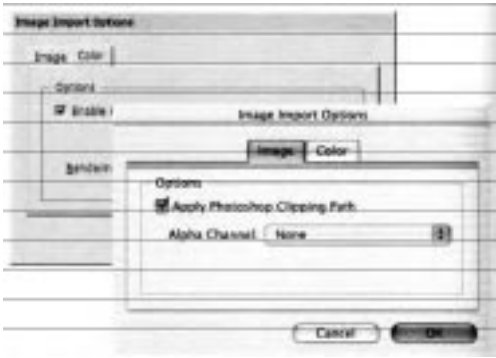
   Drag the image cursor to define the size of the rectangular frame.

TIP Only the frame is sized when you drag the image cursor. The artwork stays at its actual size. *(See page 190 for how to change the size of an image inside a frame.)*



❶ *Use the* Place dialog box (Mac) *to open a file you wish to place. Check Show Import Options to make refinements to the imported file.*

❷ *Use the* Place dialog box (Win) *to open a file you wish to place. Check Show Import Options to make refinements to the imported file.*



❸ *The* Image Import Options dialog box for TIFF *and Photoshop images.*

❹ *The* loaded image cursor *appears when you prepare to place artwork.*

File Formats

A wide variety of graphic formats can be added to InDesign documents. These formats are recommended for professional printing:

- Adobe Illustrator (AI)
- Adobe Photoshop (PSD)
- Encapsulated PostScript (EPS)
- Desktop Color Separation (DCS)
- Joint Photographer's Expert Group (JPEG)
- Portable Document Format (PDF)
- Portable Network Graphics (PNG)
- PostScript (PS)
- Scitex Continuous Tone (SCT)
- Tagged Image File Format (TIFF)

Although the following formats can be inserted into InDesign documents, they are not recommended for use in commercially printed documents. They are acceptable for low-resolution, onscreen PDF review, or non-PostScript printers:

- Enhanced Metafiles (EMF)
- Macintosh Picture (PICT)
- Graphics Interchange Format (GIF)
- PC Paintbrush (PCX)
- Windows Bitmap (BMP)
- Windows Metafile (WMF)

You can also place artwork into an existing frame. This is handy if you have set up empty frames as placeholders for graphics.

To place artwork into an existing frame:

1. Use one of the tools to create a rectangular, elliptical, or polygonal frame.

TIP You can use either the frame tools that create graphic frames or the tools that create unassigned frames *(see page 76)*.

2. Use either the Selection or Direct Selection tool to select the frame.
3. Choose File >Place and navigate to find the image you wish to place in the frame.
4. Click Choose/Open in the Place dialog box. The file automatically is inserted within the frame.

TIP You can also use the Pen tool to create frame shapes *(see Chapter 7, "Pen and Beziers")*.

To replace the artwork in an existing frame:

1. Use either Selection tool to select the frame that contains the artwork you want to replace.
2. Choose File >Place and navigate to find the image you wish to place.
3. Click Replace Selected Item in the Place dialog box ❶.
4. Click Choose/Open in the Place dialog box. The new image automatically replaces the contents of the frame.

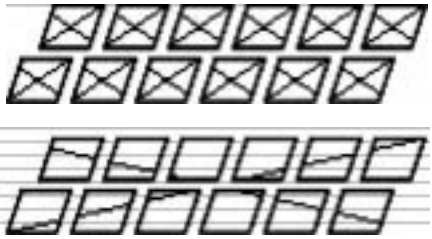
To move or copy artwork between frames:

1. Use the Direct Selection tool to select the artwork you want to replace.
2. Choose Edit >**Cut** or Edit >**Copy.** This places the artwork on the clipboard.
3. Select the frame that you want to move the artwork into.
4. Choose Edit >Paste Into. The contents of the clipboard are pasted into the frame.

Specialty Frames

Frames don't have to be singular items drawn from scratch. You can join frames into one compound shape or you can convert text into frames that can hold images. You can also bring paths from other programs into InDesign to act as frames.

You can make multiple frames act as a single item by converting them to a compound shape. Frames combined into a compound shape display a single image across all the items in the compound.



5 *Individual frames that act independently display diagonal lines within each object (top). A* **compound shape** *displays the diagonal lines across the entire set of frames (bottom).*

6 *A placed image is seen across all the items in a compound shape.*

To create a compound shape:

1. Select the frames you want to combine into a compound shape.

TIP If the frames overlap, InDesign displays a transparent area *(see page 141)*.

2. Choose **Object** >Compound **Paths> Make.** If the frame is a graphic frame, the diagonal lines cross through all the frames in the compound **5**.

To add an image to a compound shape:

1. Use either Selection tool to select the compound shape.
2. Use any of the techniques described on the previous pages to place the image in the selected frame. The image tiles across the spaces between the elements of the compound shape **6**.

To split a compound shape:

1. Select the compound shape.
2. Choose **Object** >Compound **Paths> Release.** The image is shown only through the first frame and the rest of the compound frames are available to hold other images.

❼ *The* Create Outlines command *converts text into paths that can then be modified.*

❽ *Text converted to paths can also hold imported graphics.*

You can also create unique frame shapes by converting text to frames so graphics assume the shapes of letters.

TIP If you can't draw for beans, you can convert the characters in dingbat or symbol fonts into graphic shapes such as hearts, arrows, snowflakes, and so on.

To convert text to frames:

1. Use the Selection tool to select the frame that contains the text.

   or

   Highlight the selected text within the frame.
2. Choose Type >Create **Outlines.** Each character of text is converted to paths that can be modified ❼.

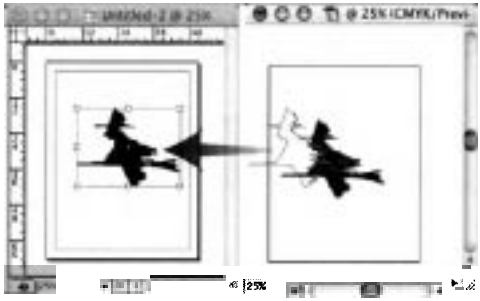
TIP You can also place images into the converted text paths as you can with compound shapes ❽.

TIP The converted paths are created as compound paths. If you want to place different images or colors in each of the frames, release the compound shape first *(see the previous page).*

TIP If you select only a portion of the text within the frame, the highhghted text is converted to inline graphics within the frame. *(See page 196for more information on working with inline graphics.)*

If you work with a vector-drawing program such as Adobe Illustrator or Macromedia FreeHand, you can also convert the paths in those programs to InDesign frames.

TIP In addition to Illustrator and FreeHand, this technique can be used with any other program that copies paths using the AICB (Adobe Illustrator Clipboard). Check your vector-drawing program manual for more information.



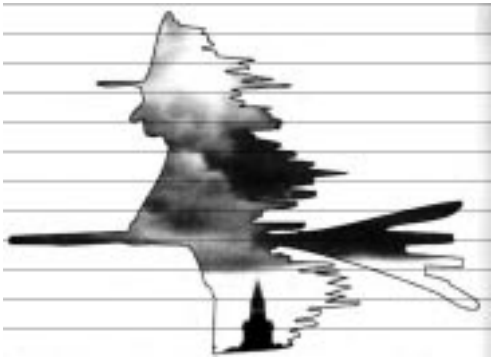
9 ***Artwork can be*** dragged from ***a*** vector program ***and converted into InDesign frames.***

To import paths as frames:

1. Position the windows of the vector-drawing program and InDesign so they are both visible on screen.
2. Select the paths in the vector-drawing program with the appropriate tool in that application.
3. Drag the paths from the vector-drawing program onto the window of the InDesign document.
4. When a black line appears around the perimeter of the InDesign window, release the mouse button. The paths are converted to InDesign unassigned frames **9**.

TIP If you don't have the screen space to see both windows at once, you can also use the clipboard to copy the paths from the vector program and paste them in InDesign.

TIP Once the vector path has been converted to an InDesign frame, it can be used to hold an image or text **10**.



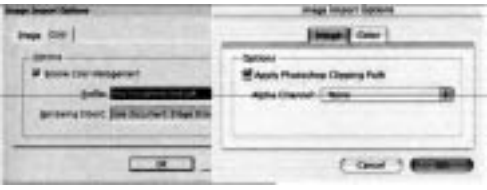
10 ***Graphics converted to frames can hold images or text.***

Dragging from Illustrator 10

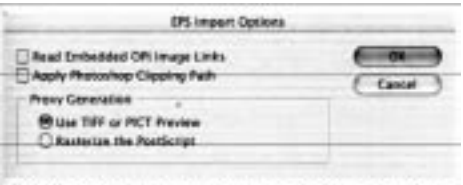
If you want to import paths from Adobe Illustrator 10 or CS, you need to change Illustrator's preferences.

Choose Files & Clipboard in Illustrator's Preferences dialog box. Under the Clipboard section, check the AICB (no transparency setting) setting. Then click the Preserve Paths button.

If this is not done, the Illustrator paths will not be converted to frames.



⓫ *The two parts of the* Image Import Options dialog box *lets you control pixel images such as TIFF and Photoshop files.*



⓬ *The* EPS Import Options dialog box *lets you control imported EPS files.*

Best file Format from Adobe Illustrator?

If you work in Adobe Illustrator, you will notice that there are several file formats you can choose when you save your work: native Illustrator, EPS, or Adobe PDF. Which one works best with InDesign?

All three file formats can be placed into InDesign documents. However, native Illustrator files show up with the best preview.

If you're like me, you probably have lots of old Illustrator documents that were saved as EPS files. There's no need to resave them. You can place them into InDesign too.

However, you may see a white background behind artwork that has been saved on a Macintosh as an EPS. If that is a problem, use the Rasterize the PostScript option during import to eliminate the white background.

Setting Image Import Options

When you import a graphic, you have some choices as to how that image is placed. The dialog box options change, depending on whether you import a pixel-based image such as a TIFF or a PSD, an EPS, or a PDF.

To set the import options for pixel images:

1. In the Place dialog box, check Import Options.
2. Choose a pixel-based image. This opens the Image Import Options dialog box for pixel-based images ⓫.
3. Select Image Settings. If the image has a clipping path, you can choose Apply Photoshop Clipping path *(see page 204)*.
4. Select Color Settings. If the image has a color profile, you can turn on its color management settings *(see page* 374).
5. Click OK to place the image.

To set the import options for EPS images:

1. In the Place dialog box, check Import Options.
2. Choose an EPS file. This opens the EPS Import Options dialog box ⓬.
3. Don't check Read Embedded OPI Image Links unless your service bureau has instructed you to have InDesign perform the image swapping.
4. If the image has a clipping path, you can choose Apply Photoshop Clipping path *(see page 204)*.
5. Set the options in the Proxy Generation to control the preview of the image:
   - Use TIFF or PICT Preview uses the preview that was created with the file.
   - Rasterize the PostScript displays the actual Postscript data as a preview. This lets you see custom Postscript code such as is found in FreeHand.
6. Click OK to place the image.

InDesign also lets you place PDF files as graphics. The import options for PDF files are different than those for other types of graphics.

TIP Native Illustrator files are also placed using the PDF import options.

To import PDF files:

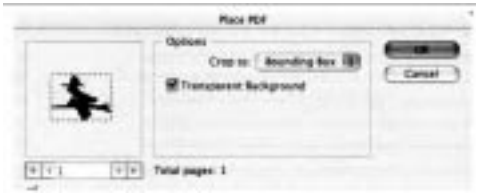
1. In the Place dialog box, check Import Options.
2. Choose a PDF file. This opens the Place PDF dialog box ⓭.
3. Use the page selectors to select the page you want to place ⓮.

TIP You can only place one page of a PDF document at a time. There are scripts that can automate the process so that each page of a PDF document is placed on a separate InDesign page. *(**See page** 354 **for information about working with scripts.**)*

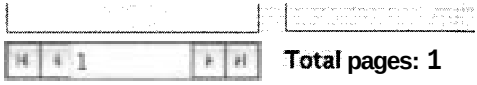
4. Use the Crop to list to determine how the PDF should be cropped within the frame ⓯. Choose the crop options:
   - Bounding Box crops to the active page elements, which includes printer marks.
   - **Art** crops to the area defined as placeable art.
   - Crop crops to only the printable area, not only to the printer marks.
   - Trim crops to the area that is the final trim size.
   - Bleed crops to the area that is the total size of the image if a bleed area has been specified.
   - Media crops to the page size of the original document.
5. Choose Transparent Background to show only the elements of the page without the opaque background ⓰.

TIP If you choose Transparent Background, you can make it opaque by adding a fill color to the frame that contains the PDF.

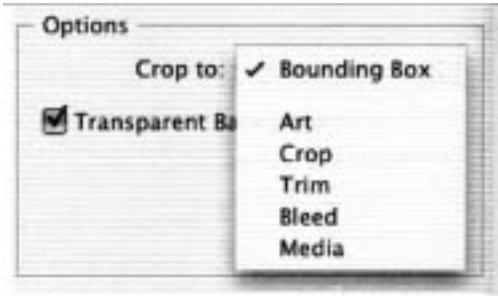
6. Click OK to place the image.



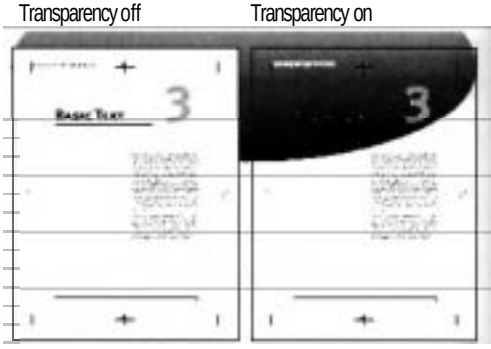
⓭ ***The*** Place PDF dialog box ***controls how PDF files are placed.***



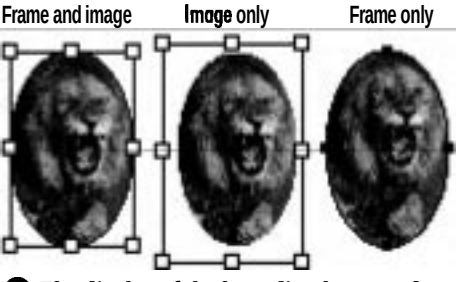
⓮ ***The*** page selectors ***let you choose which pages of a multi-page PDF you want to place.***



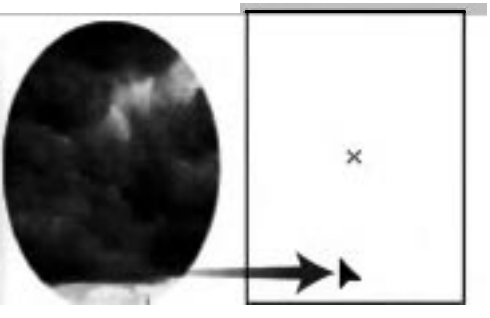
⓯ ***The*** Crop to menu ***in the Place PDF dialog box controls the size of the placed artwork.***



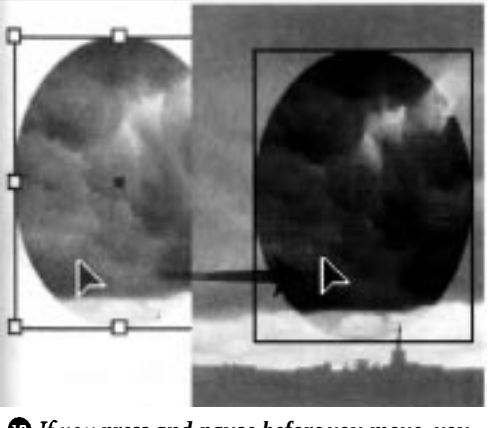
⓰ ***The effect of the*** Transparent Background ***on a placed PDF image.***



⓱ *The display of the bounding boxes and points indicate what items are selected.*



⓲ *If you move an object quickly, you only see a bounding box as the item is being moved.*



⓳ *If you press and pause before you move, you see apreview of the image being moved.*

Working with Images **Inside** Frames

After you place an image, you may want to move or modify it. Which tool you use and where you click affects what will be selected.

To select and move both the frame and the image:

1. Use the Selection tool and click the frame holding the image. A bounding box appears that indicates that the frame and its content are selected ⓱.
2. Press and drag the selection to move both the frame and the image.

TIP If you move quickly, you will see only a bounding box of the moved items ⓲. If you press and pause for a moment, you will see a preview of the items being moved ⓳.

To select the image within the frame:

1. Use the Direct Selection tool and click inside the frame where the image is visible. A bounding box for the image appears ⓱.

TIP If the image is larger than the frame, this bounding box will appear outside the boundaries of the frame.

2. Press and drag the image to move it without disturbing the frame.

TIP As you press, the areas of the image that are outside the frame are displayed lighter than the area within the frame ⓳.

To select and move just the frame:

1. Use the Direct Selection tool and click the edge of the frame. The points on the frame appear ⓱.
2. Hold the Opt/Alt key and click the frame again to select **all** the points.
3. Release the Opt/Alt key and drag the frame to move it to reveal a new part of the image.

When you apply transformations to frames that contain placed images, you have a choice as to which objects — the frame, the image, or both — are transformed. Here are some helpful guides.

TIP If you pause before you drag with any of the transform tools, you will see a preview of the image as you transform it.

To transform both the frame and the placed image:

1. Use the Selection tool to select both the frame and the placed image.
2. Make sure that Transform Content is chosen in the Transform palette menu.
3. Use any of the Transform palette fields or transform tools ⓐ.

To modify the frame only:

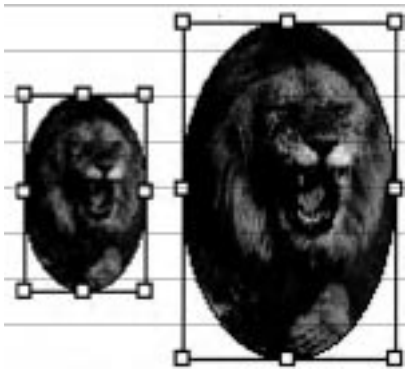
1. Turn off Transform Content and use the previous steps to scale the object.

   or

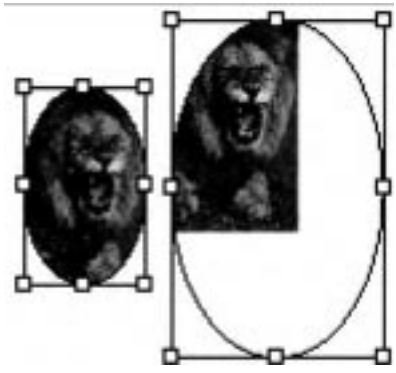
   With Transform Content turned on, hold the Opt/Alt key as you use the Direct Selection tool to select the frame.
2. Use any of the Transform palette fields or transform tools to modify only the selected frame ㉑.

To modify the placed graphic only:

1. Use the Direct Selection tool to select the artwork within the frame.
2. Use any of the Transform palette fields or transform tools to modify only the selected image ㉒.



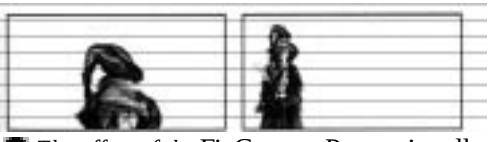
ⓐ *The* **Transform Content command** *allows you to modify a frame and a placed image at the same time.*



㉑ *With* **Transform Content turned off,** *the frame is modified but the image remains its original size.*

㉒ *With just the image selected, the transform tools and commands modify the image, but not the frame.*

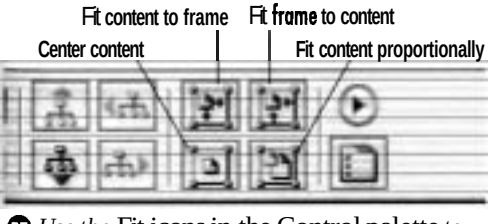
23 *The effect of the* Fit Content to Frame command.



24 *The effect of the* Fit Content Proportionally command.

25 *The effect of the* Fit Frame to Content command.

26 *The effect of the* Center Content to Frame command.



27 *Use the* Fit icons in the Control palette *to modify placed images and frames.*

Fitting Graphics in Frames

Placed images don't always fit into pre-existing frames. InDesign gives you several commands that let you quickly position and resize artwork in frames.

To resize the graphic to the frame size:

1. Use either selection tool to select the frame or the graphic inside the frame.
2. Choose Object >Fitting >Fit Content to Frame. This changes the size of the graphic to fit completely within the area of the frame 23.

TIP This command does not preserve the proportions of the artwork; the artwork may become distorted.

To proportionally resize to the frame size:

1. Use either selection tool to select the frame or the graphic inside the frame.
2. Choose Object >Fitting >Fit Content Proportionally. This changes the size of the graphic to fit completely, and without distortion, within the frame 24.

To resize the frame to the graphic size:

1. Use either selection tool to select the frame or the graphic inside the frame.
2. Choose Object >Fitting >Fit Frame to Content. This changes the size of the frame so that the artwork fits completely within the area of the frame 25.

To center the graphic within the frame:

1. Use either selection tool to select the frame or the graphic inside the frame.
2. Choose Object >Fitting >Center Content to Frame. This centers the graphic within the frame without changing the size of either the graphic or the frame 26.

TIP The Fitting commands are also available on the Control palette 27.

In addition to the commands that position graphics, you can also position images numerically within frames using the X and Y coordinates in the Transform palette.

To numerically position graphics within frames:

1. Check Show Content Offset in the Transform palette menu ㉗.
2. Use the Direct Selection tool to select the graphic inside the frame.
3. Enter the X and Y coordinates in the Transform palette. The image moves to a new position relative to the frame ㉘. This is called the *content offset.*

TIP Small plus signs (+) next to the X and Y coordinates in the Transform palette indicate that Show Content Offset is turned on ㉙.

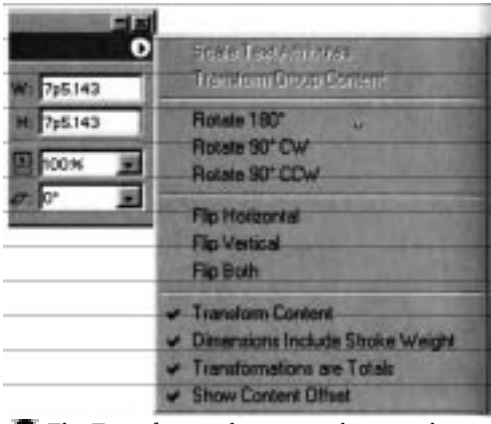
To numerically position graphics on the page:

1. Uncheck Show Content Offset from the Transform palette menu ㉗.
2. Use the Direct Selection tool to select the graphic inside the frame.
3. Set the X and Y coordinates in the Transform palette. The image moves to a new position relative to the page rulers ㉘. This is called the *absolute offset.*

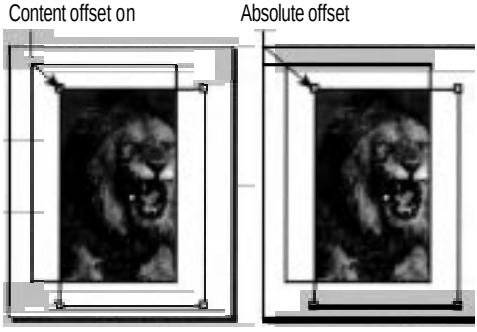
Of course you can use any of the transformation commands to scale, rotate, and shear objects within the frame. This allows you to scale images numerically within a frame.

To transform images within a frame:

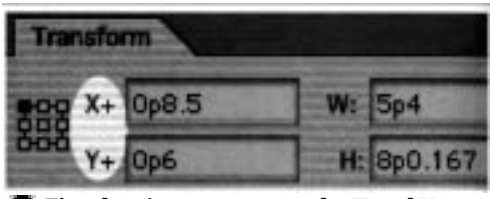
1. Use the Direct Selection tool to select the graphic inside the frame.
2. Use any of the transform tools or the transform palette described on pages **86 — 94.**



㉗ *The Transform palette menu lets you choose* **Show Content Offset**.



㉘ **Content offset** *positions the graphic relative to the frame.* **Absolute offset** *positions the graphic relative to the page.*



㉙ *The* **plus signs (+) next to the X and Y coordinates** *indicate that the position of the object is relative to the frame.*

31 *Before nesting, the circular frame with the placed image is a separate object.*

32 *After nesting, the circular frame is the content inside the rectangular frame.*

Nesting Graphic Elements

Once you have an image in a frame, you can then paste it into another frame. This technique is called *nesting elements* and it allows you much more flexibility than other programs in assembling various images. *(This is similar to the Paste-into techniques covered on pages 100 and 101.)*

TIP For instance, you can use nested elements to put a placed image inside a circular frame and then put that circular frame inside a rectangular frame. The top rectangular frame crops the circular frame while the circular frame crops the placed image.

To create a nested frame:

1. Use the Selection tool to select the element to be nested inside the frame 31.

TIP **A** nested element can be a graphic or text frame.

2. Cut or copy the element to the clipboard.
3. Select the frame that is to hold the nested element.
4. Choose Edit >**Paste Into.** This pastes the element inside the frame 32.

   The Selection tool moves all the elements in the nest.

   Frames can hold multiple levels of nested frames. So you can have a frame within a frame within a frame, and so on.

TIP Use the Fit Content commands to automatically position the nested frame inside the parent frame *(see page 191)*.

Once you have created nested elements, you can use the Direct Selection tool to select and move the items within the nest.

TIP In the example given on the previous page, you might want to move the placed image and the circular frame without moving the rectangular frame that holds those elements.

To select and move nested elements:

1. Use the Direct Selection tool to select the nested element.

TIP If the item contains a placed image the image is selected and the hand cursor displayed 33.

2. Hold the Opt/Alt + Shift keys. This changes the Direct Selection tool to the Group Selection tool *(see page 99)*.

TIP The plus (+) sign next to the white arrow indicates the Group Selection tool.

3. Click with the Group Selection tool to select both the placed image and the frame 34.

4. If you have many levels of nested elements, click with the Group Selection tool as many times as is necessary to select up through the nest levels.

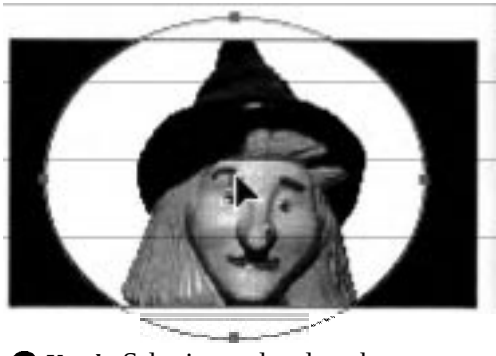
5. Switch to the Selection tool when you have selected all the nested elements you want to move.

6. Drag the centerpoint of the selected nested elements. This allows you to move the selected nested elements together 35.

TIP If you drag the bounding box handles instead of the centerpoint, you change the size of the nested element.

33 *The first click with the* Direct Selection tool *selects the placed image inside a nest.*

The next click with the Group Selection tool *selects both the frame and the placed image.*

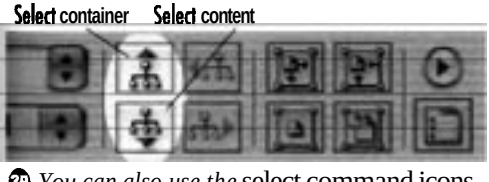


35 *Use the* Selection tool to drag the centerpoint *of the selected frame to move the selected items of the nested elements.*

37 *The first click with the* Selection tool *selects the frame that holds the nested image.*

38 *The* Select>Content command *selects the frame that was pasted into the main container.*

Choose Select>Content *again to select the graphic inside the frame.*



39 *You can also use the* select command icons in the Control palette.

You can also select nested elements using the Select commands. These commands make it very easy to select pasted-in elements and graphics.

To use the Select commands for nested elements:

1. Use the regular Selection tool to select the object. This selects the main container that holds the nested elements 40.
2. Choose Object>Select>Content. This selects the item that was pasted into the main container 37. In the case of a nested element, this is the frame that holds the placed graphic.

TIP Use the Selection tool to move this object by dragging its centerpoint.

3. You can choose Object>Select>Content again to select the placed graphic 40.

TIP If you have selected objects within the nested elements, you can choose **Object>** Select>Container to select upwards through the nested elements.

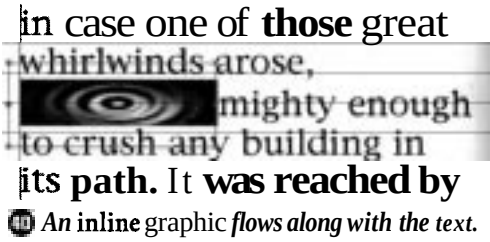
TIP The Select commands are also available as icons on the Control palette 39.

Inline Graphics

Another type of nested elemented is called an *inline graphic. An* inline graphic is an object that is pasted as a character into the actual text.

TIP For instance, you can use an inline graphic to make sure a placed image always stays near a certain area of text.

TIP An inline graphic can also be used to add images to a table *(see Chapter* 13*, "Tabs and Tables").*



40 *An* inline graphic *flows along with the text.*

41 *Use the* Direct Selection tool *to move an inline graphic inside its frame.*

To create an inline graphic:

1. Select the element that you want positioned.
2. Cut or copy the element to the clipboard.
3. Click to place an insertion point where you want the inline graphic to be positioned.
4. Choose Edit >Paste. The element is pasted into the text and flows along with any changes to the text 40.

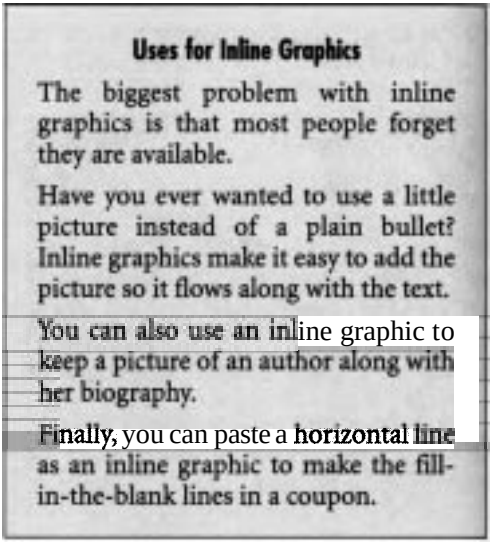
TIP Use the Direct Selection tool to move the inline graphic within its frame 41.

TIP Use the Selection tool to select and move inline graphics up or down inside the text.

You can also place an image directly into the text as an inline graphic.

To import an image directly as an inline graphic:

1. Place your insertion point where you would like the inline graphic to appear in the text.
2. Choose File >Place and select the image you want to import. The image appears inside an inline graphic frame.



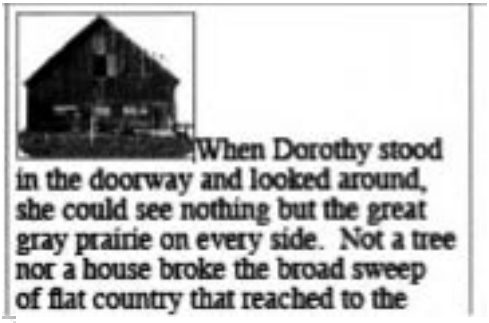
Uses for Inline Graphics

The biggest problem with inline graphics is that most people forget they are available.

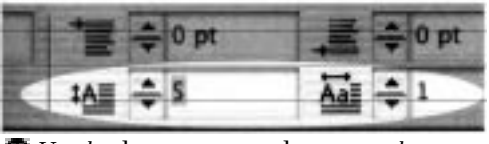
Have you ever wanted to use a little picture instead of a plain bullet? Inline graphics make it easy to add the picture so it flows along with the text.

You can also use an inline graphic to keep a picture of an author along with her biography.

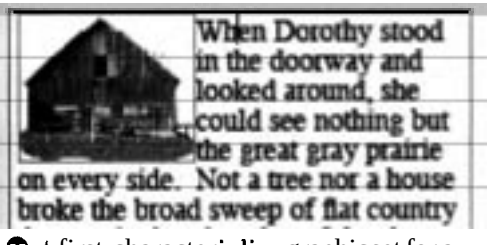
Finally, you can paste a horizontal line as an inline graphic to make the fill-in-the-blank lines in a coupon.



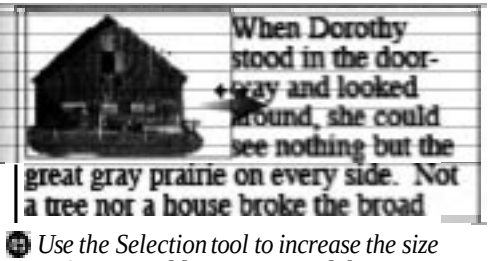
41 **A** first-character **inline** graphic *sits on the baseline of the first line of text.*



42 *Use the* drop cap controls *to cause the text to wrap around a first-character line graphic.*



43 *A* first-character **inline** graphic set for a drop cap *allows the text to wrap around the inline graphic.*



44 *Use the Selection tool to increase the size of the frame to* add space around the **inline** graphic.

One of the limitations of **working** with **inline** graphics is that the text does not automatically wrap around the **inline** object. *(See page 216 for more information on text wraps.)* However, if your **inline** graphic is at the top of a paragraph, there is a trick you can use to force the text to wrap around an **inline** graphic.

To force text around a first character **inline** graphic

1. Paste the **inline** graphic as the first character of the paragraph. The **inline** graphic sits on the first line baseline 42.
2. Use the Paragraph palette or Control palette Drop Cap controls to set the number of lines in the drop cap for the paragraph 43.

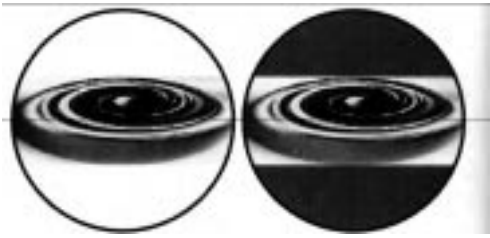
TIP The number of lines necessary to wrap the text around the **inline** graphic depends on the height of the **inline** graphic. The taller the graphic, the higher the number of lines that it needs to drop 44.

TIP Leave the number of characters in the drop cap as 1. This causes only the **first**-character **inline** graphic to drop.

TIP If you need more space around the **inline** graphic, add kerning *(see page 57)* between the graphic and the **first** line of text. Or use the Selection tool to increase the size of the frame holding the **inline** graphic 45.

Styling Placed Images

Once you have placed a graphic within a frame, you can employ many techniques to style the frame or the image. For instance, you can change the color of the frame or the color of the image.



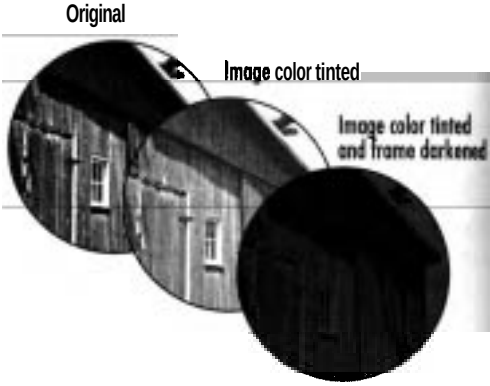
When a frame is selected, choosing a fill color changes the background color of the frame.

To color the frame fill or stroke:

1. Use the Selection tool to select the frame.
2. Click the Fill icon in the Toolbox or Color or Swatches palette.

   or

   Click the Stroke icon in the Toolbox or Color or Swatches palette.
3. Choose a color in the Swatches palette. If the Fill icon is chosen, you'll see the fill color wherever the image doesn't fill the frame.



You can change the appearance of a grayscale image by changing the image color or the fill color of the frame.

If you import a grayscale image, you can add color to it, so you change the black values in the image.

To color a grayscale image:

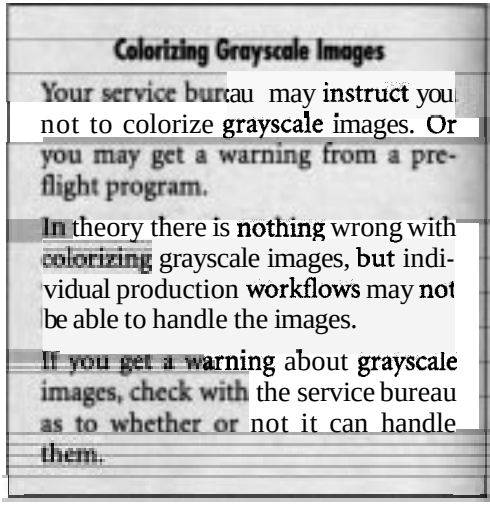
1. Use the Direct Selection tool to select the grayscale image.
2. Choose the Fill icon in the Color palette or Toolbox.

TIP The default fill color for grayscale images is black.

3. Change the tint value the lighten the image.

   or

   Choose a color in the Color or Swatches palette. The grayscale values change to a tint of the color chosen.
4. Use the steps in the previous exercise to change the fill color of the frame. This colorizes the white areas of the image.

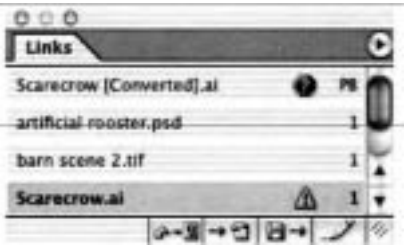


Colorizing Grayscale Images

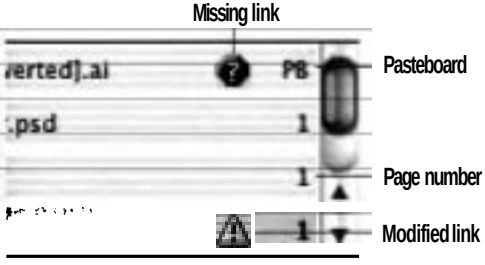
Your service bureau may instruct you not to colorize grayscale images. Or you may get a warning from a preflight program.

In theory there is nothing wrong with colorizing grayscale images, but individual production workflows may not be able to handle the images.

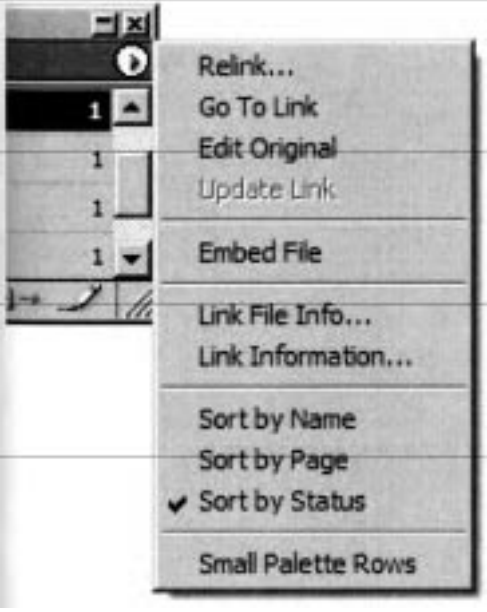
If you get a warning about grayscale images, check with the service bureau as to whether or not it can handle them.



The Links palette *displays the placed images in the document.*



The icons and page numbers *next to a listing in the Linkspalette tell you the status of a placed image.*



The Links palette menu *contains the commands for working with the Linkspalette.*

Linking Graphics

When you place an image, you don't actually place the image into the document. You place a screen preview of the image that links to the original graphic. In order to print the file, InDesign needs to follow that *link* to the original graphic.

TIP It is possible to link text files as well as graphics, but there are few practical advantages. *(See "Links for Text Files" on page 201 for a discussion on the merits of linking text files.)*

To examine the links in a document:

1. Choose Window>Links. This opens the Links palette. The Links palette shows all the linked images in the document with their page numbers. Special icons indicate the status of the image.
   - Missing Link indicates that InDesign can't find the original graphic.
   - Modified Link indicates that the graphic has changed and has a different modification date from when it was originally placed.
2. Use the Links palette menu to sort the list of graphics as follows:
   - Sort By Name arranges the graphics in alphabetical order.
   - Sort By Status arranges the missing or modified graphics together.
   - Sort By Page arranges the graphics according to the page they are on.

The Missing or Modified Links notice appears when you open a file whose link is missing or has been changed (51).

To relink graphics when you open a document:

1. Click the Fix Links Automatically button in the Missing or Modified Links notice. *All* modified graphics are automatically updated.
2. If there are missing links, the operating system navigation dialog box opens. Use it to find each missing graphic.

TIP It is not necessary to find missing links as you work on a document. For instance, if you only need to work on text, you don't need to find missing graphics. However, you must fix all links before you send out a document to be printed.

If you open a document without choosing the Fix Links button, you can use the Links palette to find missing graphics and relink them to the screen preview.

TIP Using the Links palette lets you carefully check each graphic to make sure it is the one you want to modify.

To relink a missing graphic:

1. Select the missing link in the Links palette.

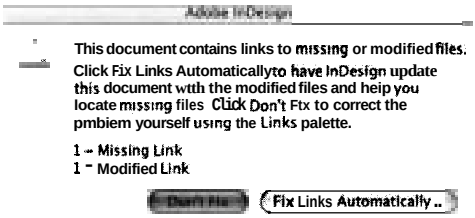
TIP You can also select multiple links. Shift-click to select a range of links. Cmd/Ctrl-click to select non-contiguous links.

2. Click the Relink button (52). This opens the navigation dialog box where you can find the missing file.

   or

   Choose Relink from the Links palette menu.

3. Navigate to find the missing file.
4. Click OK to relink the graphic.



(51) *The* Missing or Modified Links notice *appears when you open a file that has a missing link to a text or graphics file.*

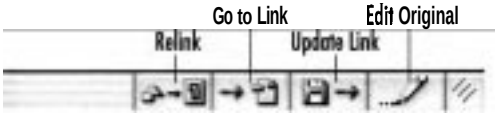
Pixels or Vectors?

There are two main types of graphics in desktop publishing. Pixel-based images (sometimes called *bitmapped*, or *raster* images) display images as an arrangement of small rectangles. Scanners and digital cameras all capture images in pixels. Adobe Photoshop lets you paint or modify pixels.

Vector images display artwork according to paths filled with colors. They are the same as the vector shapes in InDesign. Programs such as Adobe Illustrator and Macromedia FreeHand create vector images.

Pixel-based images are usually used for photographs or images with blends. Vector images are usually used for more precise images such as maps or technical drawings.

One of the big benefits of working with vector images is that they can be scaled up or down without losing any details. Pixel-based images can lose detail if they are scaled up too high.



52 *The* icon commands in the Links palette *allow you to access frequently used commands.*

Links for Text Files

InDesign also has a preference *(see page 489)* that automatically creates a link for placed text files. With the preference turned on, if you modify the original text file that was placed in the InDesign document, you see a notice when you open the file that links are missing or modified.

It might seem like a good idea to use the Update Link command to update the text within the InDesign document. However, if you do, you will lose any formatting or changes you have applied within InDesign.

In most cases it is not necessary to keep the link for text files. You are probably better off embedding the text file within the document *(see page 199)*.

However, if you are working with InCopy or some other sort of workgroup software, you may not be able to embed text files within the document. In that case, check with your workgroup supervisor for the proper procedures.

If a graphic has been modified, you can use the controls at the bottom of the Links palette to update the link.

To update modified links:

1. Select the modified link in the Links palette.
2. Click the Update Link button 52.

   or

   Choose Update Link from the Links palette menu.

TIP You can select more than one graphic to update multiple links. Shift-click to select a range of links. Cmd/Ctrl-click to select non-contiguous links.

The Links palette also lets you move quickly to a specific graphic.

To jump to a linked graphic in the document:

1. Select the link in the Links palette.
2. Click the Go To Link button 52.

   or

   Choose Go To Link from the Links palette menu.

The Links palette can also be used to open and edit a graphic.

To edit a linked graphic:

1. Select the graphic you want to place.
2. Choose Edit Original from the Links palette menu.

   or

   Click the Edit Original button in the Links palette 52. The graphic opens in the program that created it.

TIP You can also edit the graphic in its original program by holding the Opt/Alt key and double clicking the graphic on the page.

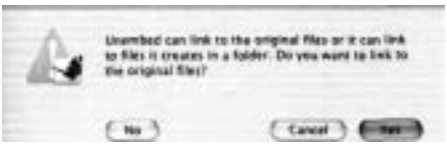
You may want to know more details about the image that is placed in a file. The Link Information dialog box gives you a wealth of information about an imported graphic.

53 *The* **Link Information dialog box** *gives you information about a placed graphic.*

To see the link information:

1. Select the linked graphic in the Links palette.
2. Choose Link Information from the Links palette menu. This opens the Link Information dialog box **53**.
   - Name shows the name of the file.
   - Date Modified shows when the file was last saved.
   - Size shows the size of the file.
   - Page shows what page the file is on.
   - Link Needed shows if the file will be embedded in the document.
   - Color Space shows the type of color information in the file.
   - Profile shows what type of color management profile has been applied to the file.
   - File Type shows what program was used to save the file.
   - Content Status shows if the item is missing, modified, or up to date.
   - Location shows the complete path to find the file.
3. If necessary, use the **Relink** button to find missing graphics.
4. Use the Next or Previous buttons to move to other graphics in the Links palette.
5. Click the Done button when you are finished.

54 *The* **Embed icon** *in the Linkspalette indicates that all the information necessary to print the graphic is stored in the InDesign file.*



55 *The* **Unembed alert box** *lets you choose to link back to the originalfile or create a new file.*

When to Embed Graphics

You may be tempted to embed many, if not all, of your graphics within the InDesign document. After all, it makes it much easier to send a file to the service bureau if you don't have to remember to send the graphic files along with it. *(For more information on preparing files for printing, see Chapter 18, "Output.")*

Embedding graphics increases the size of the InDesign file. Just a few large graphics can make the InDesign file balloon in size. This means the file will take a long time to open or save.

You shouldn't have problems, though, if you embed small graphics, such as logos. Just remember that each time you embed a small graphic, it adds to the file size. Page after page of small graphics adds up.

My own feeling is to avoid embedding graphics. That way I don't have to worry about the file size. But I do have to remember to send the necessary files along to the printer.

Embedding Graphics

Usually, only the preview of a graphic is contained within an InDesign file. You can, however, embed a graphic within the InDesign file. This means that all the information necessary to print the file is contained within the InDesign document.

TIP Embedded graphics will increase the size of the InDesign file.

To embed placed images or text:

1. Select the placed image.

   or

   Select the frame that contains the imported text.

2. Choose Embed File from the Links palette menu. If you have selected a graphic, the Embed icon appears next to the file name in the **Links** palette 54.

   or

   If you have selected text, the file name disappears from the Links palette.

TIP Embedded text files do not add to the size of the InDesign file.

TIP Once you embed a graphic, InDesign no longer needs to find the original file on your hard disk.

To unembed images:

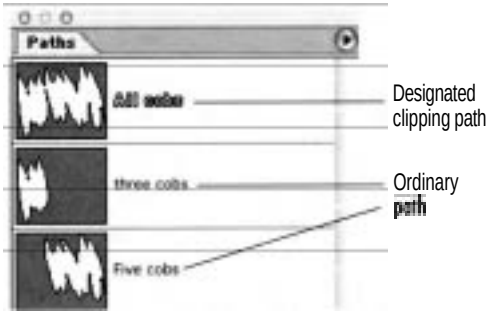
1. Select the embedded image.
2. Choose Unembed File from the Links palette menu. The Unembed alert box appears 55.
3. Click Yes to link the embedded graphic back to the original file that was placed into InDesign.

   or

   Click No. **A** dialog box appears asking you to choose the destination for a new file.

Using Clipping Paths

Raster images saved as TIFF or EPS files are always rectangular. If you want to see only part of the image you import, you can create a ***dippingpath*** that surrounds the part of the image that you want to see. The rest of the image becomes transparent. One way to create a clipping path is to use Adobe Photoshop to create paths for the file.



56 Photoshop's Paths palette *shows the paths saved with the file. Clippingpaths are shown in outlined type.*

To import a file with a clipping path:

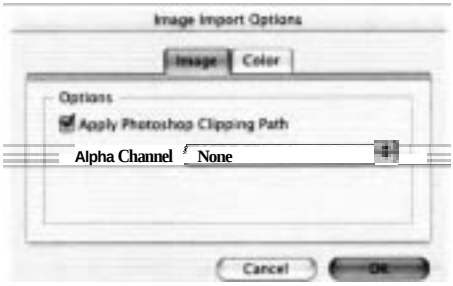
1. In Photoshop, use the Path tools to create a path around the image 56.

TIP Although you will not see the clipping effect in Photoshop itself, the areas of the image inside the path will be visible in InDesign. The areas outside the path will be invisible.

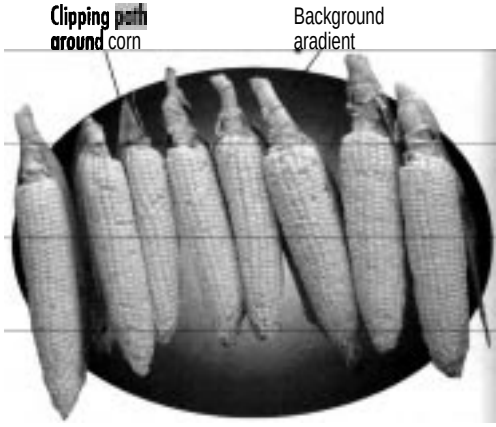
2. Use Photoshop's Path palette menu to designate the path as a clipping path.
3. Save the file as a TIFF, EPS, or Photoshop file.

TIP You can have many paths saved as part of a Photoshop file, but only one path can be designated as a clipping path.

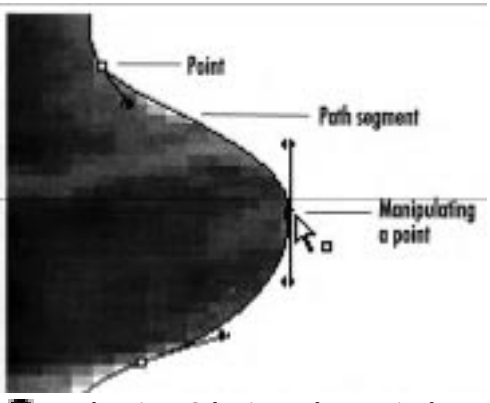
4. In InDesign, choose File >Place and choose the file you have created.
5. In InDesign's Import Options, check Apply Photoshop Clipping Path 57. The image is automatically clipped so that only the areas inside the path are visible in the layout 58.



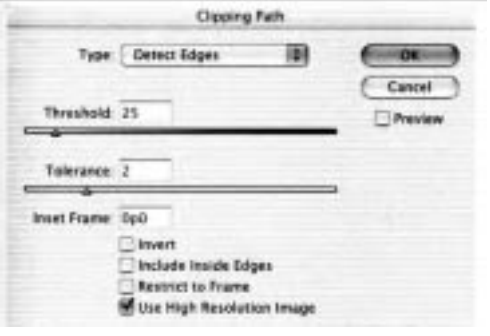
57 *InDesign's* **Image Import Options dialog box** *lets you choose to apply a clippingpath to a file.*



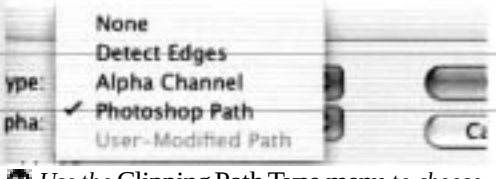
58 *An example of how a* **clipping path** *allows an image to have a transparent background to show other objects behind it.*



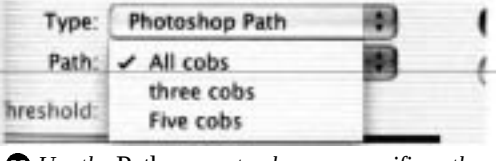
59 *Use the Direct Selection tool to manipulate the shape of a clippingpath around an image.*



60 *The* Clipping Path dialog box *lets you create or modify a clippingpath for a graphic.*



61 *Use the* Clipping Path Type menu *to choose what type of clipping path to apply to the image.*



62 *Use the* Path menu *to choose a specific path attached to a graphic.*

Once you have a clipping path applied to a graphic, you can change the shape of the path to show more or hide areas of the image.

To modify the shape of a clipping path:

1. Use the Direct Selection tool to select the placed image. If the image has a clipping path, the path appears as a series of points and path segments 59.
2. Use any of the path techniques to change the shape of the clipping path. *(See Chapter 7, "Pen and Beziers" for information on working with paths.)*

You can also turn a clipping path into a frame. This lets you apply a stroke to the path.

To convert a clipping path into a frame:

1. Use either selection tool to select the image with the clipping path.
2. Right-mouse click (Win) or Control-click (Mac) to open the contextual menu.
3. Choose Convert Clipping Path to Frame. The clipping path is converted.

You don't have to designate a clipping path in Photoshop. InDesign lets you select any path, saved with the image file as a clipping path.

To choose a path as an InDesign clipping path:

1. Select the placed image that includes a path.
2. Choose Object >**Clipping Path.** The Clipping Path dialog box appears 60.
3. Use the Type menu in the Clipping Path dialog box to select the Photoshop Path option 61. *(See the* ***next page*** *on how to use the Detect Edges and Alpha Channel options.)*
4. Use the Path menu to select which path should be used as a clipping path 62.
5. Click the Preview button to see the effects of choosing a path.
6. Click OK to apply the path.

What happens, though, if an image doesn't contain a clipping path? Fortunately, InDesign can create a clipping path from the edges—or the differences between the dark and light colors—of the image.

To create a clipping path from an image:

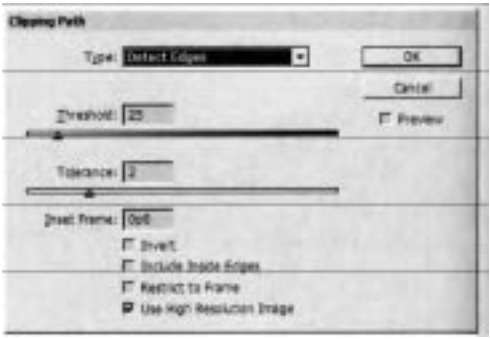
1. In the Clipping Path dialog box (63), choose Detect Edges from the Type menu (61).
2. Adjust the Threshold slider to define the color that is used as the area outside the clipping path (64). *0* is pure white.
3. Adjust the Tolerance slider to allow a slight variation in the Threshold color (64). A high tolerance often smooths out small bumps in the path.

You can also use an alpha channel, saved with the file, as a clipping path.

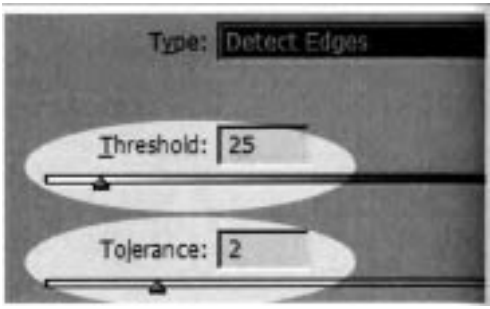
TIP Alpha channels are grayscale images that are saved along with the color or black channels of an image.

To choose an alpha channel as a clipping path:

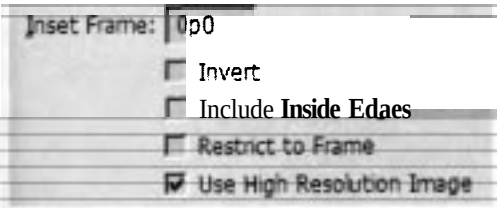
1. Use the Type menu in the Clipping Path dialog box to select Alpha Channel.
2. Use the Alpha menu to select which channel should be used as a clipping path.
3. Because alpha channels can contain shades of gray, adjust the Threshold slider to define the color that is used as the area outside the clipping path. 0 is pure white.
4. Adjust the Tolerance slider to allow a slight variation in the Threshold color. A high tolerance often smooths out small bumps in the path.



(63) *The* Clipping Path dialog box *gives you special controls for creating a clippingpath based* **on** *the* ***appearance*** *of the image.*



(64) *The* Threshold and Tolerance sliders *let you determine the shape of clippingpaths created by the Detect Edges and Alpha* ***Channel*** *commands.*



65 *The* clipping **path** controls *at the bottom of the Clipping Path dialog box give you control over the shape and appearance of a clipping path.*

66 *The* Include Inside Edges *in a clippingpath creates transparent areas within the image such as the area inside the basket handles.*

The End of the Clipping Path?

Clipping paths are not suitable for many types of images. A clipping path acts like a knife that cuts out the background of an image. This is good if you need a really sharp edge on an image. However, soft, curly hair may need variations in transparency that a clipping path can't provide.

Fortunately InDesign lets you use the transparency in Photoshop files to make parts of an image transparent *(see the next page)*.

All clipping paths can be further modified by using the controls at the bottom of the Clipping Path dialog box @.

To modify the effects of a clipping path:

1. Type a positive value in the Inset Frame field to shrink the entire path into the image.

   or

   Type a negative value to expand the path outside the image.
2. If necessary, check Invert to switch which areas the path makes visible and which areas are left invisible.
3. Check Include Inside Edges to add areas that are enclosed by the foreground image to the clipping path 65.
4. Check Use High Resolution Image to create the path from the high resolution version of the file rather than the preview. This is a slower but more accurate way of calculating the path.
5. Check Restrict To Frame to prevent the clipping path frame from displaying any part of the image that is outside the frame that holds the image.

To delete the clipping path around an image:

1. Select the placed image.
2. Choose Object >**Clipping Path.** The Clipping Path dialog box appears.
3. Choose None from the Type pop-up list.

Importing Transparent Images

InDesign offers you a special advantage when you place native Photoshop (PSD) or Illustrator (AI) files. If there is any transparency in the placed image, InDesign displays the image with the same transparency as in the original file.

To use the transparency in a Photoshop file:

1. In Photoshop, use any of the tools to silhouette or fade the edges of the image. The Photoshop transparency grid indicates which parts of the image are transparent 67.
2. Save the file as a Photoshop (PSD) file.
3. Choose **File** >Place to import the file into the InDesign document.

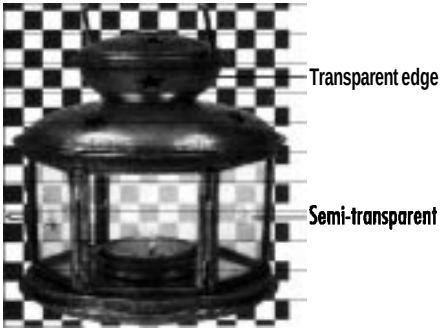
TIP The Image Import Options dialog box automatically sets the Alpha Channel import option to Transparency. You do not have to set the transparency option for native Photoshop files.

4. Click to place the file. The areas that were transparent in Photoshop will be transparent in InDesign 68.

TIP You can combine the use of a Photoshop path together with transparency to create a silhouette with a see-through transparency.

To use the transparency in an Illustrator file:

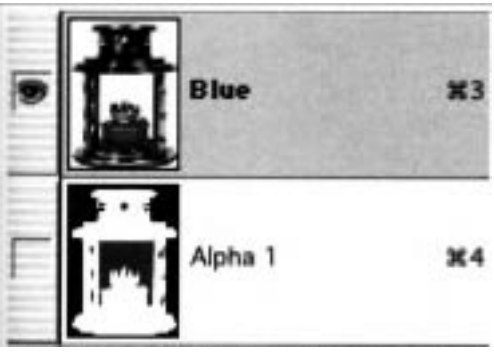
1. In Illustrator, use any of the commands to apply transparency to the artwork.
2. Save the file as an Illustrator (AI) file.
3. Make sure that the PDF Compatibility option is checked in the Save dialog box.
4. Import the file into the InDesign document. The areas that were transparent in Illustrator will be transparent in InDesign 69.



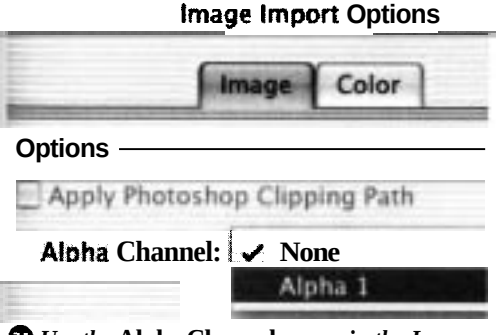
67 Photoshop's transparency grid *indicates the transparency applied to an image.*

68 *A transparent Photoshop file lets you see through to the glass to the text behind the image.*

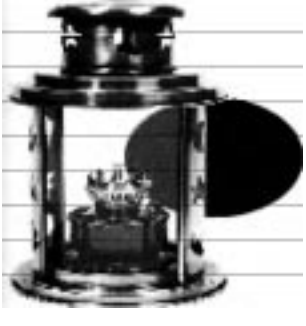
69 *Transparency in an Illustrator image is maintained when placed over the text or other objects in InDesign.*



70 *The* **alpha channel for an image** *in the Photoshop Channels palette.*



71 *Use the* **Alpha Channel menu** *in the Image Import Options to apply the channel to an image.*



72 *An alpha channel applied to an image allows the image to have transparency.*

In addition to importing Photoshop files with transparent layers, InDesign can also apply an alpha channel saved with flattened files. This allows you to display transparency in file formats that do not support layers or a transparency grid.

To apply an alpha channel to an image:

1. Add an alpha channel to the image in Photoshop. The alpha channel should be created as follows 70:
   - Black designates those areas that are not transparent.
   - White designates those areas that are completely transparent.
   - Shades of gray are used for those areas that are partially transparent.
2. Save the file as a TIFF, GIF, JPEG, or BMP file.
3. Choose File >Place to import the file into the InDesign document.
4. Use the Show Import Options checkbox to open the Image Import Options dialog box.
5. Choose the name of the alpha channel from the Alpha Channel menu and click OK to place the file 71.
6. If necessary, click to place the file on the page. The alpha channel is applied to the image to create opaque, transparent, and semi-transparent areas 72.

Viewing Images

When you have a large document with a lot of images in it, you might find that the redraw time is delayed as you move around. However, you can set preferences for how your images are displayed by lowering some of the image detail for increased speed as you move through pages. These display settings can be applied to the entire document or to individually selected objects.

TIP The display settings for images don't affect how the document will print.

To set the default appearance of previews:

1. Choose Edit >Preferences >Display Performance (Windows).

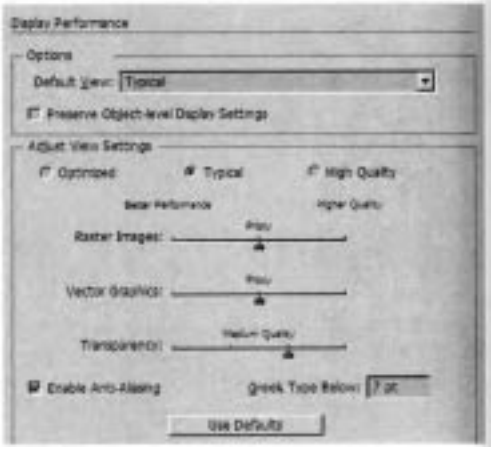
   OR

   Choose **InDesign** >Preferences >Display Performance (Mac OS X). This opens the Display Performance Preferences dialog box 73.

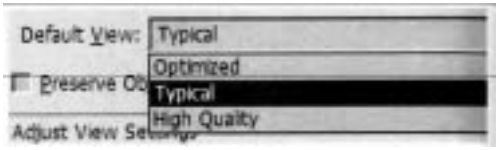
2. Choose one of the three options from the Default View Settings menu 74.
   - Optimized is used when you want the fast screen redraw and best performance.
   - Typical is used when you want a better representation of the images.
   - High Quality is used when you want to see as much detail as possible onscreen. This option may cause **InDesign** to work slower than the other choices.

TIP Each of the menu choices corresponds to one of the radio buttons in the Adjust View Settings controls.

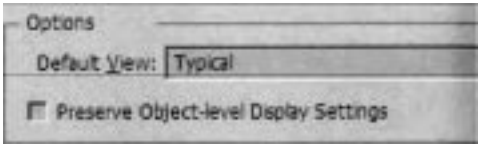
3. Check Preserve Object-level Display Settings to use the display settings that have been applied to individual images *(see the next page)* 75.



73 *The* Display Performance dialog box *controls how images and transparency effects are displayed.*

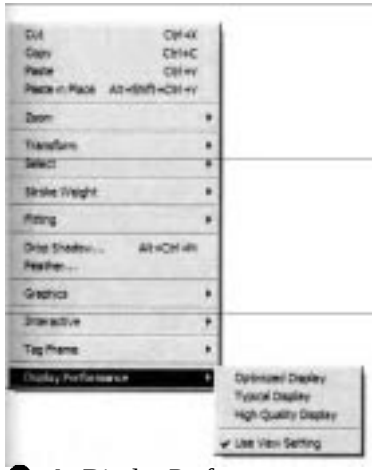


74 *The* Default View Settings menu *lets you choose which display performance setup is applied to images.*



75 *Check* Preserve Object-level Display Settings *to let each object's settings override the overall document display setting.*

76 ***The*** Display Performance contextual menu ***settings let you quickly switch from one display performance to another.***



77 ***The*** Display Performance contextual menu ***for an object lets you change the display performance for that object.***

As you work, you can switch between the menu commands without having to open the Display Performance Preferences dialog box.

To switch the default view setting:

1. With no object selected, Right-mouse click (Win) or Control-Click (Mac). This opens a contextual menu 76.
2. Choose one of the view settings from the Display Performance submenu.
3. Choose Allow Object-level Display Settings to override any individual image previews ***(see the next exercise).*** This does not delete those individual settings, it only overrides them.
4. Choose Clear Local Display Settings to delete any individual image previews.

TIP You can also use the View menu to choose the view settings or to override any individual image previews.

You can also set each individual image to its own display setting. This lets you set one large image to faster screen redraw while showing more detail in other objects.

To set individual image previews:

1. Select the image.
2. Right-mouse click (Win) or Control-click (Mac). This opens the contextual menu for the display of that object 77.
3. Choose one of the options from the Display submenu of the contextual menu.

TIP The Use View Setting command sets the object back to whatever is the current View Setting in the Display Performance Preferences.

TIP You can also use the **Object** >Display submenu to choose the view settings for a selected object.

The labels Optimized, Typical, and High Quality are merely guides. You can customize the specific displays for raster images, vector art, and transparency effects in the Adjust View Settings area of the Display Performance Preferences.

To set the raster and vector displays:

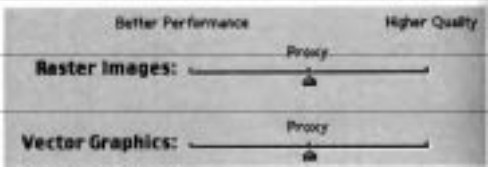
1. Choose Edit > Preferences > Display Performance (Win).

   or

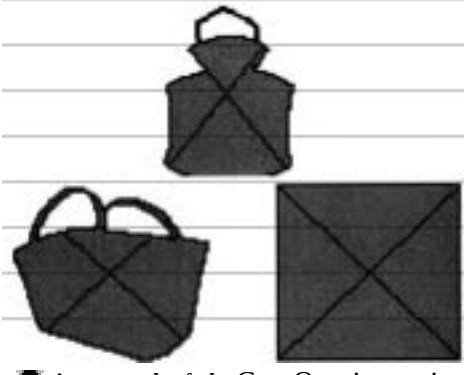
   Choose **InDesign** > Preferences > Display Performance (Mac).
2. Choose one of the radio button settings in the Adjust View Settings area 78.
3. Drag the slider for the Raster Images or Vector Graphics as follows 79:
   - Gray Out (far left) displays a gray background instead of the image 80. This is the fastest performance.
   - Proxy (middle) displays a 72 ppi screen preview of the image 81. This setting provides the best performance that still shows what the image looks like.
   - High Resolution (far right) displays the maximum resolution in the image 81.
4. Repeat the process for each of the other radio button settings.

TIP Raster Images and Vector Graphics settings don't have to be set for the same resolution. This allows you to have a faster redraw for large raster files, and more details in the lines of vector graphics.

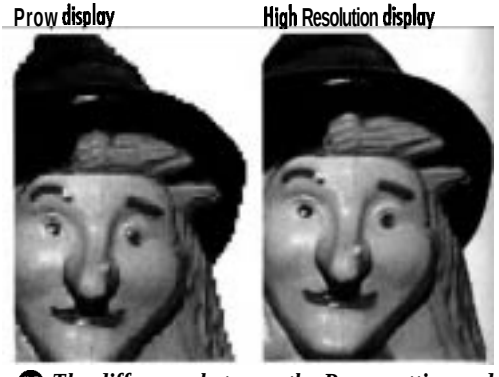
78 *The* Adjust View Settings radio buttons *give you three different display settings to apply to a document or individual images.*



79 *The* Raster Images and Vector Graphics sliders *let you control how those formats are displayed.*

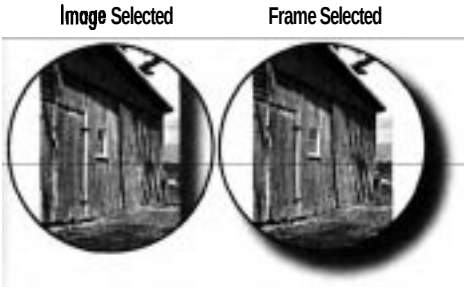


80 *An example* of *the* Gray Out view setting.



81 *The difference between the Proxy setting and the High Resolution setting.*

82 ***The*** Transparency slider ***lets you control the display of drop shadows, feathers, and transparency effects. The setting labels appear as you move the slider.***



83 ***The difference between applying a drop shadow to an image versus a frame.***

You can also adjust the display for the transparency effects as well as the drop shadows and feather effects.

To set the transparency effects displays:

1. Choose one of the radio button settings in the Adjust View Settings area.
2. Drag the Transparency slider to each notch setting as follows **82**: (The labels appear as you drag the slider.)
   - Off (far left) displays no transparency effects. This is the fastest performance.
   - Low Quality (second from left) displays basic opacity and blend modes. Drop shadows and feathers are displayed in low resolution only. Some blend modes may change in the final output.
   - Medium Quality (second from right) displays drop shadows and feathers in low resolution.
   - High Quality (far right) displays high resolution drop shadows and feathers. Blend modes appear in their correct CMYK color display.
3. Repeat the process for each of the other Adjust View radio button settings.

Applying Effects to Images

It makes a difference if you apply a drop shadow to the frame or to the image inside the frame.

To apply effects to imported images:

- Select the object with the Selection tool to apply the effect to the frame that contains the image **83**.

  or

  Select the image with the Direct Selection tool to apply the effect to the image within the frame **(I)**.

TIP If you apply a drop shadow to an image, you may need to enlarge the size of the frame in order to see the shadow.

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TEXT EFFECTS 9

Go back and look at the advertisements they did back in the 1800s. (Yes, that was before I worked in advertising.) In those ads, the text marches along in a straight line without swerving toward or moving around the images.

In those days, it was extremely difficult to wrap text around an image. Each line of text had to be cut and pasted around the edges of an image.

The paste-up artists never dreamed of setting text along a path so that it follows the shape of a rollercoaster—that would have been far too much work!

Adding short horizontal rules to divide one paragraph from another was another tedious task. In fact, if you look closely at some old advertisements, you can see that the rule isn't perfectly centered in the column.

Fortunately, electronic page-layout programs such as InDesign make it easy to do all these special text effects with incredible precision.

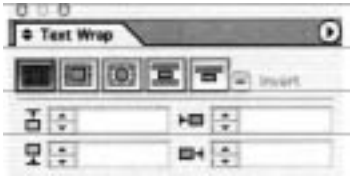
Wrapping Text

One of my favorite effects to apply to text is to arrange it to flow around images and other objects. This is called *text wrap*. InDesign gives you many different options for running text around objects you create in InDesign or imported graphics.

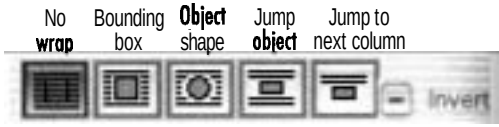
To apply a text wrap:

1. Select the object that you want the text to wrap around. This can be an imported graphic, a text frame, or an unassigned frame.
2. Choose Window >Type & Tables >Text Wrap. This opens the Text Wrap palette ❶.
3. Choose one of the following options for how the text should flow around the object ❷. *(See the chart opposite for a visual representation of each text wrap.)*
   - No wrap lets the text flow across the object.
   - Bounding Box flows the text around the bounding box for the object.
   - Object Shape flows the text around the shape of the frame or the shape of the placed graphic. *(See the exercise on page 218 for more information on setting the Object Shape text wrap.)*
   - Jump Object flows the text to the next available space under the object.
   - Jump to Next Column flows the text to the next column or text frame.
4. Check Invert to force the text to flow inside the object ❸.
5. Enter an amount in the offset fields to contol the distance between the text and the object ❹.

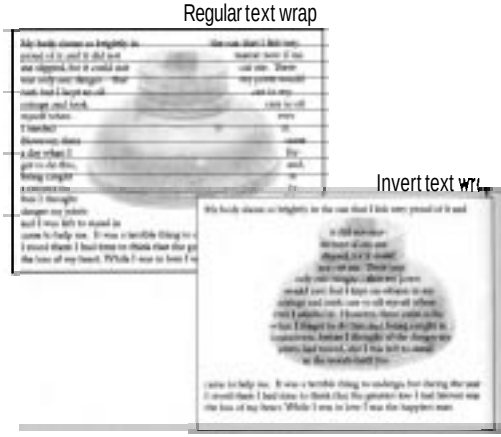
TIP The number of available offset fields depends on the type of text wrap you choose.



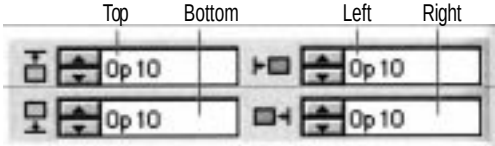
❶ *The* Text Wrap palette *controls the settings for how textflows around an object.*



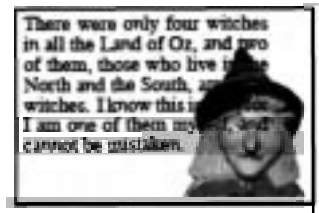
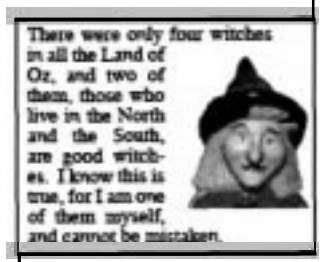
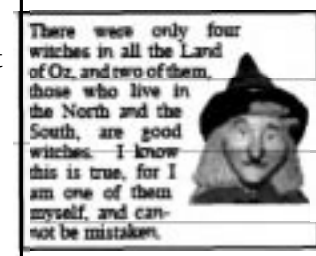
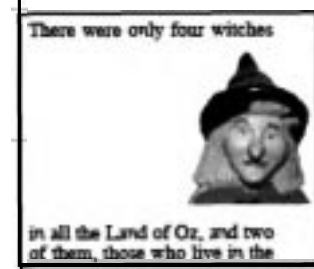
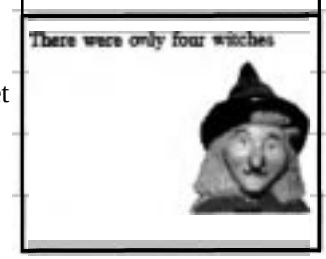
❷ *The five different* text wrap buttons *let you choose how the text wraps around objects.*



❸ *When the Invert* command *is turned on, the text wrap causes the text to flow inside, not outside, an object.*



❹ *The text wrap* Offset controls *allow you to set the distance between the text and a graphic.*

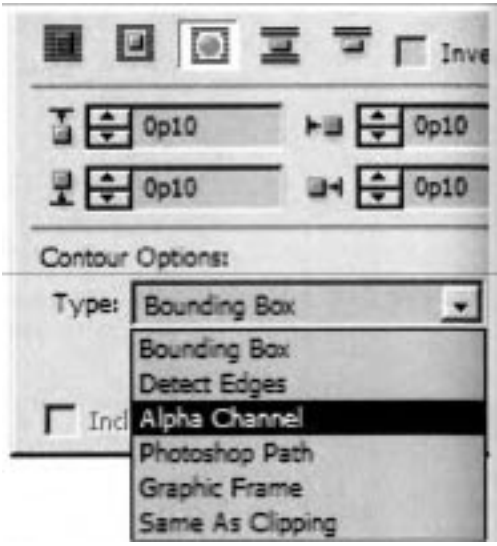
Wrap Chosen	Offset available	Results
No **Wrap**	No offset options available.	
Bounding Box	Top, bottom, left, and right offset options available.	
Object Shape	Top offset option is the only one available. Amount is used as the space around the entire graphic.	
Jump Object	Top, bottom, left, and right offset options available. However only the top and bottom offsets affect the text.	
Jump to Next Column	Top, bottom, left, and right offset options available. However only the top offset affects the text.	

TIP Unless you change the preference setting (see page *491*), lines which wrap below the text wrap object skip to the next available leading increment below the object.

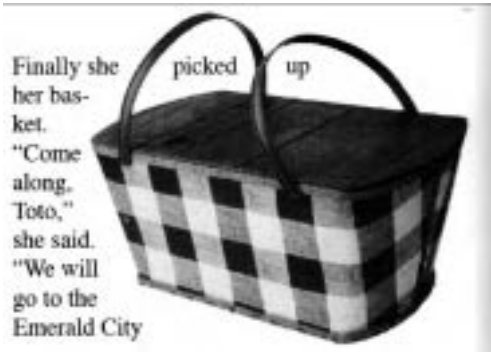
When you choose Object Shape for the text wrap, InDesign lets you set the contour options for that shape. This gives you more control over the shape of the text wrap.

To set the text wrap contour options:

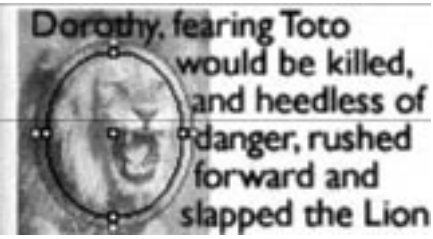
1. Use the Direct Selection tool to select the image.
2. Click the Object Shape text wrap button in the Text Wrap palette.
3. Choose Show Options from the Text Wrap palette menu to display the Contour Options at the bottom of the Text Wrap palette.
4. Use the Contour Options Type menu to choose the type of element that should be used to create the text wrap ❺:
   - Bounding Box uses the rectangle that contains the image.
   - Detect Edges uses the differences between the pixels of the image and its background.
   - Alpha Channel lets you choose an embedded alpha channel.
   - Photoshop Path lets you choose an embedded path.
   - Graphic Frame uses the shape of the frame that contains the image.
   - Same As Clipping uses whatever shape has been designated as the clipping path for the image *(see page* 204).
5. If you choose Alpha Channel or Photoshop Path, use the second pop-up menu to choose a specific channel or path.
6. Check Include Inside Edges to make the text wrap inside any holes in the image, path, or alpha channel ❻.



❺ *The* **Contour Options Type menu** *lets you choose what object controls the shape of the text wrap.*



❻ *Use the* Include Inside Edges **option** *to have text within the edges of the image, such as within the basket handles of this image.*

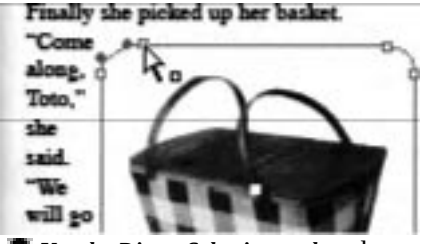


7 ***An example of how an invisible object can be used to create a text wrap.***

A text wrap doesn't have to be around visible objects. You can use an object with no fill or stroke as the shape to wrap text around **7**. This creates special effect for text around an image.

To wrap text around an invisible object:

1. Draw an object with no fill or stroke.
2. Set the Text Wrap to Object Shape.



8 ***Use the Direct Selection tool to*** change the shape of a text wrap path.

Once you set a text wrap, you can still manipulate it so that the text reads more legibly or fits more attractively into the contour of the object. This is called a ***custom text*** wrap.

To create a custom text wrap:

1. Use either selection tool to select the object that has the text wrap applied to it.

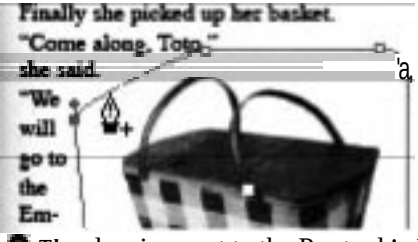
TIP Apply the Object Shape text set for Graphics Frame (see page 216) to create a simple text wrap without a lot of points.

2. Use the Direct Selection tool to move the points on the text wrap path **8**.

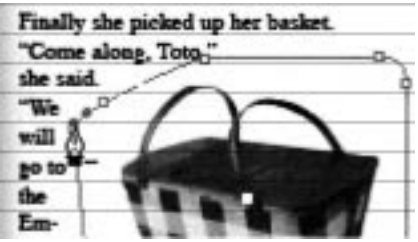
TIP You can preview how the text reflows around the text wrap. Press and hold for a moment before you move the point of the text wrap. You can then see the text reflow as you move the point.

3. Click the Pen tool between points on the text wrap path to add a new point to the path **9**.
4. Click the Pen tool on a point on the text wrap path to delete the point from the path **10**.

TIP Hold the Cmd/Ctrl key to access the Direct Selection tool while using the Pen tool.



9 ***The*** plus sign next to the Pen tool ***indicates that*** you ***can add a point to the text wrap path.***



10 ***Position the Pen tool over a point and click to*** delete points from a text wrap path.

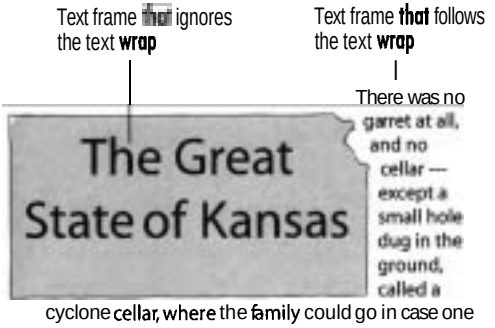
You may find that you don't want some text to be affected by a text wrap. For instance, you might want to have the body text in one frame to run around an image but have the text label in another frame to appear over the image ⓫. That's when you need to direct the text frame to ignore a nearby text wrap.

To ignore the text wrap:

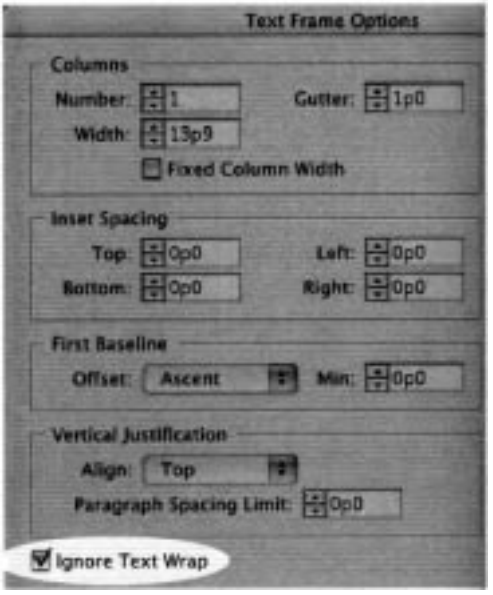
1. Select the text frame that contains the text that you don't want affected by the text wrap command.
2. Choose **Object >Text** Frame Options. This opens the Text Frame Options dialog box ⓬.
3. Check Ignore Text Wrap. The text in that frame is unaffected by any objects that have a text wrap applied.

TIP Text wrap is applied even if the object that has the wrap is on a hidden layer. Use the Layer Options dialog box to change this so that hidden layers do not exert a text wrap *(see Chapter* 11, *"Layers" for more information on working with layers).*

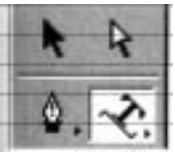
TIP Ordinarily, InDesign's text wrap is applied to text both above or below the object that has the text wrap turned on. Use the text wrap setting in Composition preferences *(see page* 490) to have the text wrap applied only to text below the object. This is closer to how QuarkXPress applies text wrap.



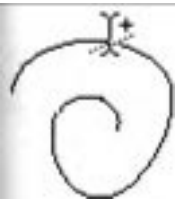
⓫ *An example of how* Ignore Text Wrap *keeps the map title from being affected by the text wrap applied to the outline of the state.*



⓬ *The* Ignore Text Wrap checkbox *in the Text Frame Options dialog box prevents text from being affected by any text wrap settings.*

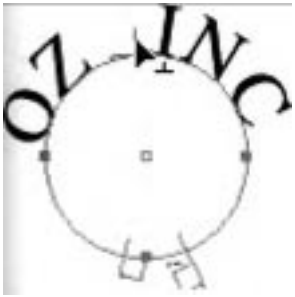


⓭ *The* Path Type tool *in the Toolbox is used to add text to a path.*



⓮ *The plus sign next to the Path Type cursor indicates you can click to add text to a path.*

⓯ *Drag the indicator line to move the text along a path.*



⓰ *The* center point indicator *allows you to move text or flip it from one side of the path to another.*

Text on a Path

When you create an object such as a text frame, the outside shape of the frame is considered the object's path. Not only can InDesign fit text inside a text frame, it also lets you position text so that it runs along the outside of the frame.

To run text on the outside of a path:

1. Choose the Path Type tool in the Toolbox ⓭.
2. Move the tool so that it is near the path. A small plus sign appears next to the tool cursor ⓮.
3. Click with the Path Type tool. A blinking insertion point appears on the path.
4. Type the text. Use any of the text controls to select or modify the text.

TIP Use the Direct Selection tool to select the path and change its fill or stroke to none to make the path invisible. *(See Chapter 7, "Pen and Beziers," for more information on modifying paths.)*

Once you apply text to a path, you can drag to position the text.

To position text on a path:

- Drag the indicator at the start or end of the text on a path to change the start or end point of the text ⓯.

  or

  Drag the small indicator within the text to change the center point of the text. ⓰.

TIP You can also drag the center point indicator to the other side of the path.

TIP You can use the Paragraph palette *(see page 62)* to change the alignment of the text between the start and end indicators.

To apply effects to text on a path:

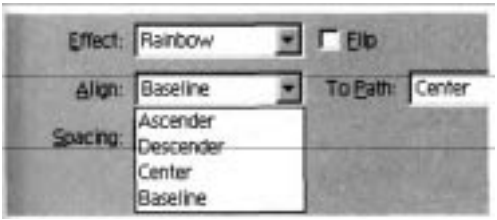
1. Choose Type >Type on a Path >Options. This opens the Path Type Options dialog box ⓱.
2. Use the Effect menu ⓲ to control how the text is positioned in relationship to the path ⓳.
   - Rainbow positions the text in an arc along any curves in the path.
   - Skew distorts the text vertically as it is positioned along curves in the path.
   - 3D Ribbon distorts the text horizontally as it is positioned along curves in the path.
   - Stair Step aligns the individual baselines of each letter so that the text stays vertical as it is positioned along curves in the path.
   - Gravity uses the distortion of the path to distort the text as it is positioned along curves in the path.
3. Click the Flip checkbox to position the text on the other side of the path.
4. If the spacing of the text is uneven, use the spacing control to tighten the character spacing around sharp turns and acute angles on the path.

TIP Higher values remove more space from between the characters.

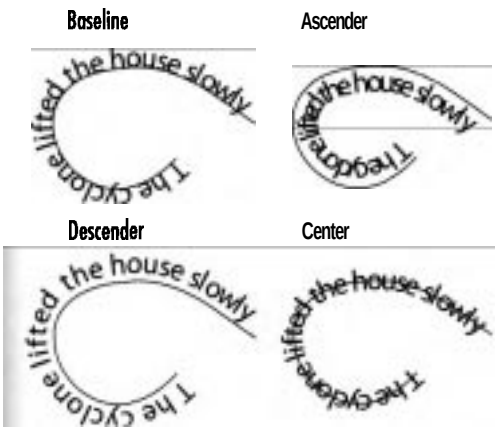
⓱ *The* Path Type Options dialog box *allows you to control how text is applied to a path.*

⓲ *The* Effect menu *controls the appearance of the text on the path.*

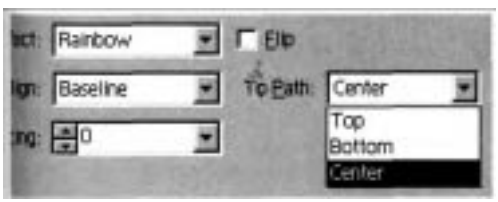
⓳ *The* five effect settings *applied to text on a path.*



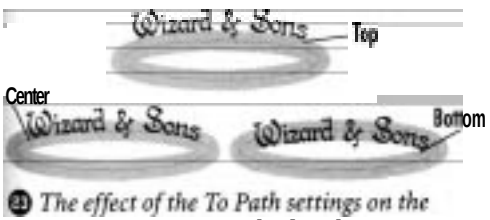
20 ***The*** Align menu ***controls how the text is positioned in relationship to the path.***



21 ***The*** Align choices ***applied to text on a path.***



22 ***The*** To Path menu ***positions the vertical alignment of the text on the path.***



23 *The effect of the To Path settings on the* position **of** text on a stroked path.

You can also control where the letters are positioned vertically on the path.

To set the vertical alignment of text on a path:

1. Use the Align menu **20** to control how the text is positioned in relationship to the path **21**.
   - Ascender positions the text so that the tops of the tallest letters touch the path.
   - Descender positions the text so that the bottoms of the lowest letters touch the path.
   - Center positions the text so that the middle of the text touches the path.
   - Baseline positions the text so that the baseline of the text touches the path.
2. Use the To Path menu to position the vertical alignment in one of the following positions **22**:
   - Top positions the text relative to the top of the path's stroke weight **23**.
   - Center positions the text in the middle of the path's stroke weight **23**.
   - Bottom positions the text relative to the bottom of the stroke weight **23**.

TIP If you do not see any changes from the To Path settings, try increasing the thickness of the stroke weight.

TIP You can also use the Baseline Shift controls ***(seepage*** 58) to move the text up or down relative to the path.

Working with Paragraph Rules

The correct way to create a line above or below a paragraph is with paragraph rules. These are lines that travel with the paragraph and that can be applied as part of style sheets *(see page* 328).

To apply paragraph rules:

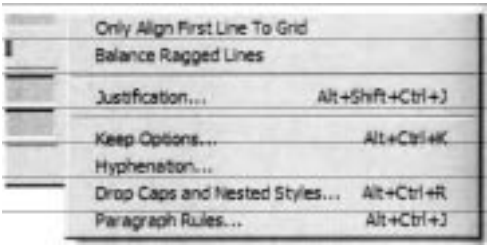
1. Select the paragraph to which you want to apply the rule and choose Paragraph Rules from the Paragraph palette menu (24). This opens the Paragraph Rules dialog box (25).
2. Choose Rule Above or Rule Below to specify whether the rule appears before or after the selected paragraph (26).
3. Check Rule On to activate the rule.

TIP If you want rules both above and below the paragraph, repeat steps 2 and 3.

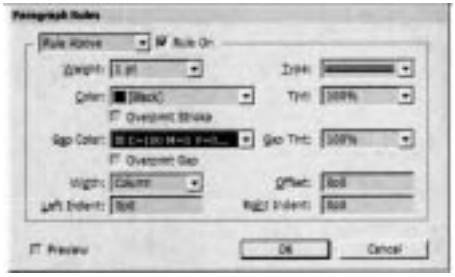
Why use paragraph rules?

If you want a line (technically called a *rule)* to appear above or below a paragraph, you might draw a line using the Pen or the Line tool. Unfortunately, if the text reflows, that line does not travel with the text. You could also paste the line into the text as an inline graphic *(see page 196),* but you would not have much control over that line.

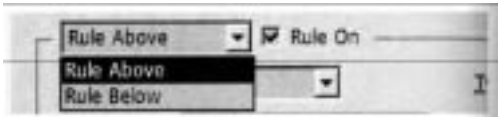
The proper way to create lines above or below paragraphs is to use the Paragraph Rules commands. Because the rules are applied as part of the paragraph settings, they automatically move if the paragraph moves. In addition, they can be precisely positioned in relationship to the paragraph.



24 *Use the* Paragraph palette menu *to open the Paragraph Rules.*

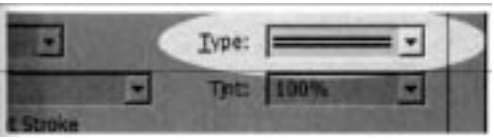


25 *The* Paragraph Rules dialog box *controls the settings for paragraph lines.*



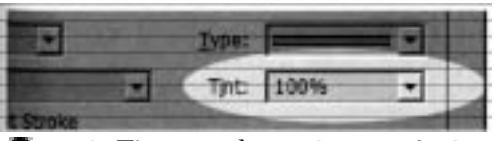
26 *Choose* Rule Above or Rule Below *to position the line above or below aparagraph.*

27 *Use the* Weight control *to define the thickness of the paragraph rule.*

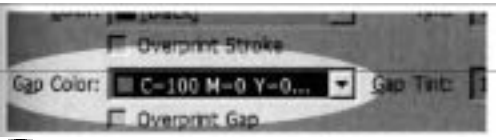


28 *Use the* Type list *to choose the stroke style for theparagraph rule.*

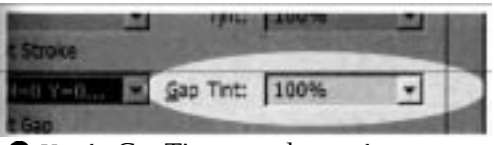
29 *Use the* Color list *to choose the main color for the paragraph rule.*



30 *Use the* Tint control *to set the screen for the color of the paragraph rule.*



31 *Use the* Gap Color list *to set the secondary color of the paragraph rule.*



32 *Use the* Gap Tint control *to set the screen for the gap color of the paragraph rule.*

Once you have turned on the rule, you can style its appearance. This is somewhat similar to styling the stroke for an object.

To style the appearance of a rule:

1. Set an amount for the weight (or thickness) of the rule 27.
2. Use the Type list to choose a stroke style for the rule 28.

TIP In addition to the default stroke styles, this list also displays the custom stroke styles you define for the document *(see page* 149).

3. Use the Color list to apply a color or gradient swatch to the rule 29.

TIP The available swatches are those previously defined in the Swatches palette.

TIP Use the Text Color setting to have the color of the rule change automatically if the text color changes.

4. If desired, check Overprint Stroke to set the ink to overprint *(see page 136for setting overprints).*
5. If you have chosen a color for the rule, use the Tint controls to create a shade of the color 30.
6. If you have chosen a rule style that has a gap, use the Gap Color list to apply a color or gradient swatch to the gap 31. This is similar to setting the Gap Color for strokes, strikethroughs, and underlines.
7. If you have chosen a gap color for the rule, use the Gap Tint controls to create a shade of the gap color 32.
8. If desired, check Overprint Gap Color to set the gap ink to overprint.

The length of a rule (called its width) can be set to cover the width of the column or the width of the text. The rule can also be set to be indented from the column or text margins.

To control the width of a rule:

1. Choose from the Width list in the Paragraph Rules dialog box as follows ㉝:
   - Column creates a rule that is the same width as the column that holds the text ㉞.
   - **Text** creates a rule that is the same width of the closest line of text ㉟.

TIP If you set a rule below a paragraph that ends in a short line, the rule will be the same length as the last line.

2. Set the Left Indent to the amount that the rule should be indented from the left side of the column or text ㊱.
3. Set the Right Indent to the amount that the rule should be indented from the right side of the column or text ㉟.

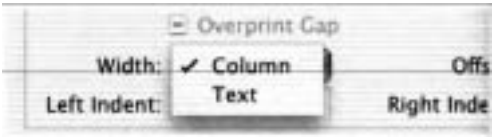
TIP Use positive numbers to move the rule in from the margin ㊱. Use negative numbers to move the rule outside the margin. The rule can extend outside the text frame.

By default the paragraph rule is positioned on the baseline of the text. You can control the position above or below the baseline ㊲. This is called the *offset* of the rule.

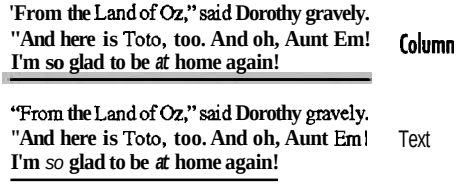
To control the offset of a rule:

- In the Paragraph Rules dialog box, enter a value in the Offset field.
  - For a Rule Above, positive numbers raise the rule above the baseline.
  - For a Rule Below, positive numbers lower the rule below the baseline.

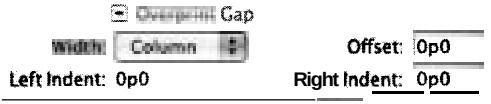
TIP Negative numbers move rules in the opposite direction.



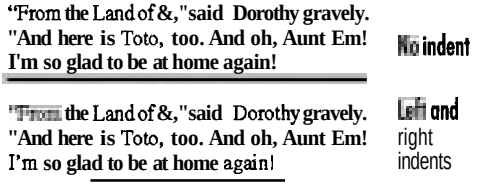
㉝ *The* Width list *lets you choose the length of paragraph rules.*



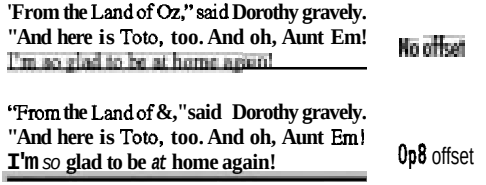
㉞ Column width fits *the rule to the width of the column.* Text width fits *the rule to the neighboring text.*



㉟ *The* Left Indent and Right Indent fields *let you modify the length of a rule.*



㊱ *How changing the* Left and Right Indent *settings changes the look of rules.*

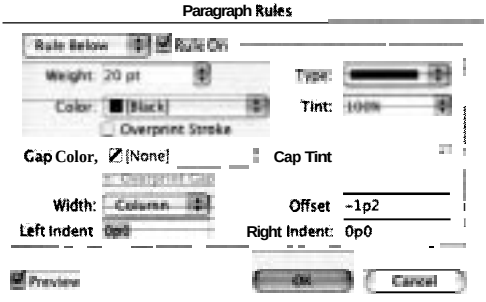


㊲ *Change the* Offset amount *to move a rule up or down relative to the text.*

The Guardian of the Gate

It was some time before the Cowardly Lion awakened, for he had lain among the poppies a long while.

37 *A paragraph rule can create the effect of reversed text.*



38 *A dialog box showing the sample settings for a paragraph rule that create the effect of reversed text.*

True Story

When I first started learning page layout software, I used the art director's computer at the advertising agency where I worked. I stayed after hours to explore the programs and create my own documents.

When I saw the command "Rules" in the menu, I figured that was where they kept the laws governing the program. Since I didn't want to mess up the art director's machine, I never chose the command.

It was several years later (and several horrible jobs without any paragraph rules) that I discovered what the "Rules" were.

You can create many special effects with paragraph rules. One of the most common is to superimpose text inside paragraph rules to create the effect of reversed text. Most reversed text is white type inside a black background. However, any light color can be used inside any dark background **38**.

TIP Don't forget that you can also use the underline or strikethough styles to create reversed text *(see page* 56).

To reverse text using rules:

1. Apply a light color to a line of type.
2. Open the Paragraph Rules dialog box.
3. Create a Rule Below.
4. Set the weight of the rule to a point size large enough to enclose the text. For instance, if the text is 12 points, the rule should be at least 12 points.

TIP If you have more than one line of text, you need to calculate the size of the leading times the number of lines.

5. Set a negative number for the offset value.

TIP The offset amount should be slightly less than the weight of the rule. For instance a rule of 14 points might take an offset of – 11 points.

6. Check Preview so you can see the effect of the weight and offset settings you choose.
7. Adjust the weight and offset, if necessary.
8. Click OK to apply the rule **39**.

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PAGES AND BOOKS 10

Most people who lay out documents work on projects that have more than one page — booklets, brochures, newsletters, menus, proposals, magazines, books, and so on. Even a lowly business card has two pages if you design a front and back.

When you work with multi-page documents, you need to add pages, flow text, apply page numbers, and force text to move to certain pages.

If you are working on very complex documents, you need to make sure all the pages have the same structure.

If you are working on a book, you will want to join individual chapters together. You may also want to automate the process of creating a table of contents or index.

Here's where you'll learn how automate and organize working with multi-page layouts. In addition, you'll learn how to use InDesign's Book features to synchronize multiple documents in a large project. You'll also discover special features for creating a table of contents from text.

Changing the Pages Palette

You may want to change the display of the Pages palette.

To open the Pages palette:

- If the Pages palette is not visible, choose Window > Pages to open the palette ❶.

To control the display of the Pages palette:

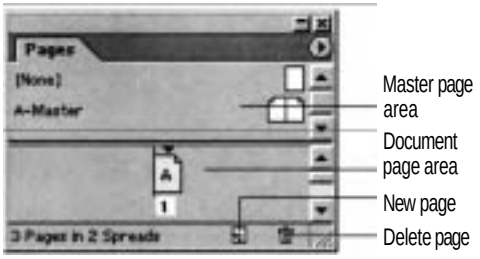
1. Choose Palette options from the Pages palette menu. This opens the Pages Options dialog box ❷.
2. Use the Pages Icon Size menu to change the size of the document pages icons as they appear in the Pages palette. The four choices are Small, Medium, Large, and Extra Large.

TIP Small allows you to fit the most number of pages in the smallest palette area.

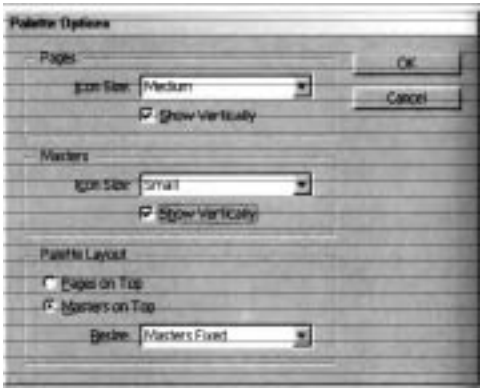
3. Use the Masters Icon Size menu to change the size of the master page icons. These choices are the same as the Pages Icon Size menu.
4. Uncheck Show Vertically to display the pages horizontally in the palette ❸.

TIP Turning the Show Vertically option off makes it easier to fit more pages in a smaller palette area.

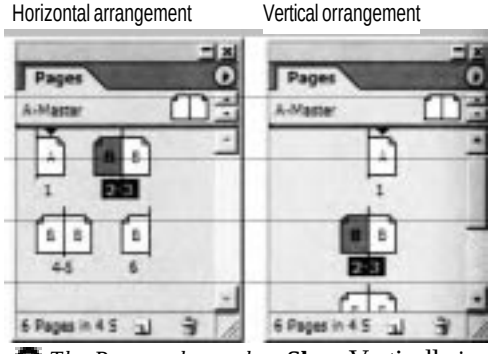
5. Choose Pages on Top to position the document pages at the top of the palette ❹.
6. Choose Masters on Top to position the master pages at the top of the palette.
7. Use the Resize list to control what happens when you resize the palette:
   - Proportional maintains the same relative area as you change the size of the palette.
   - Pages Fixed adds new space only to the masters area.
   - Masters Fixed adds new space only to the pages area.



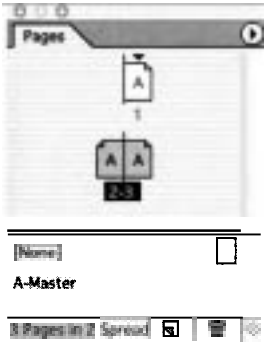
❶ *The* Pages palette *is the command center for multi-page documents.*



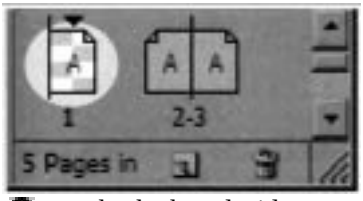
❷ *The* Palette Options dialog box *lets you control the appearance of the Pagespalette.*



❸ *The Pagespalette when* **Show** Vertically *is turned off (left) and turned on (right). More pages are visible in the horizontal orientation.*



❹ *An example of choosing* Pages on **Top.**



❺ ***The*** checkerboard grid over a page *indicates* ***that an effect such as transparency or drop shadow has been applied to that page.***

❻ ***Drag a master page from the master page area of the Pages palette to the document area to add pages to a document.***

Adding Blank Pages

Although you probably specified a certain number of pages before you started your document *(see page 18)*, you might need to add more pages after you've already started working on it. You can add pages as you work or you can add a particular number of pages at a precise location.

TIP A checkerboard grid over the page display in the Pages palette indicates that an effect that requires flattening *(see page 436)* such as a transparency, drop shadow, feather, or Photoshop transparency has been applied on that page ❺.

If you need to add just a few pages, you can add them one-by-one, manually.

To manually add pages:

1. Click the New Page icon in the Pages palette to add a single page.

   or

   Drag a master page or a non-master page from the master page area to the document area of the palette ❻. *(See pages 245–249 for how to work with master pages.)*

2. Repeat as many times as necessary until you have added all the pages you need.

Glossary of Page Terms

As you work with pages and the Pages palette, it helps if you understand the following:

- **Document pages:** The main pages of your document. These are the pages that contain your project. Items that are on the document pages are *document page items*.
- **Master pages:** The pages that contain elements that are repeated on all the document pages. Items that are on the master pages are called *master page items*.
- **Local Overrides:** Normally you can not select or modify master page items. However, if you apply a local override to the master page items on a specific document page, they can be modified on the document page.

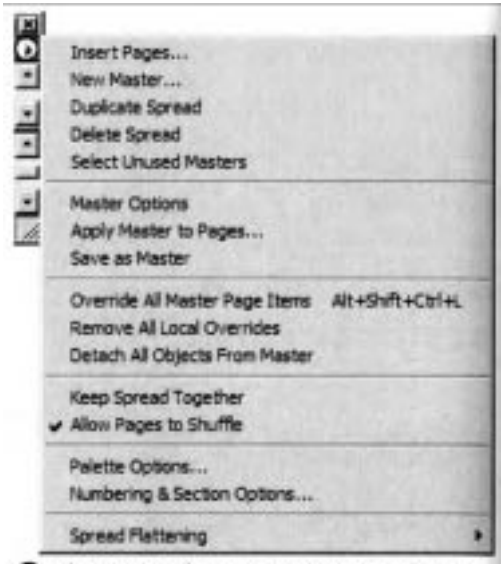
If you need to add many pages, rather than dragging pages over and over in the Pages palette, you can add them using the Insert command. This also lets you specify where to add the pages.

To add pages using the Insert command:

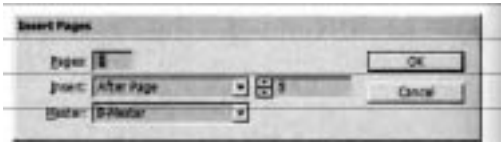
1. Choose Insert Pages from the Pages palette menu ❼. The Insert Pages dialog box appears ❽.
2. Type the number of pages you want to insert in the Pages field.
3. Choose where to add the pages within the document from the Insert list as follows ❾:
   - Before Page lets you insert new pages before a specific page.
   - After Page lets you insert new pages after a specific page.
   - At Start of Document inserts new pages at the beginning of the document.
   - At End of Document inserts new pages at the end of the document.
4. Use the Master menu to choose the master page that the new pages should be based on.

   or

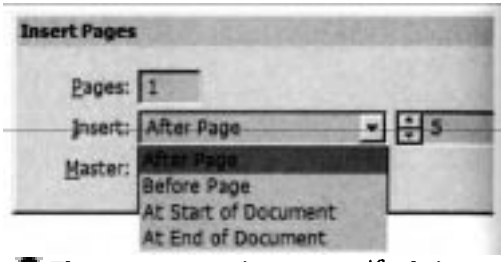
   Choose None from the Master menu to have an empty page that does not act as a master applied to the new pages.
5. Click OK. The new pages appear in the Pages palette.



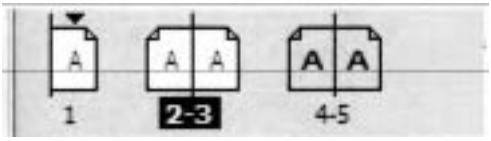
❼ *The* **Pages palette menu** *gives you choices for working with pages in a document.*



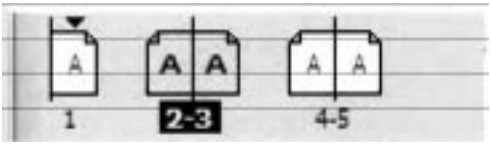
❽ **The Insert Pages dialog box lets you add many pages at once to a document.**



❾ *The* **Insert menu** *gives you specific choices as to where to insertpages.*



⑩ *The colored highlight on the* targeted pages *(pages 4-5) shows they are not the active pages (pages 2-3).*



⑪ *The highlight on the page number and the page for the* active pages *(pages 2-3) shows they are both targeted and active.*

Navigating Pages

As you work with pages in the Pages palette, you should understand the difference between targeting a page or working on a page. The active page is the page you are currently working on. The targeted page is the page chosen in the Pages palette.

To target a page:

- Click the page in the Pages palette. A highlight appears on the page ⑩.

TIP When a page is targeted, it means you can apply a command in the Pages palette even without working on the page.

To work on a page:

- Double-click the page number or name of the master page spread in the Pages palette. **A** highlight appears over the number or name of the page ⑪.

TIP When you work on the page, that page or spread is centered within the document window.

InDesign has several different ways to move from page to page. If you are used to using QuarkXPress, you may want to navigate using the Pages palette. This method is also handy as you can position the Pages palette anywhere you want on the scren.

To move to a specific page using the Pages palette:

- Double-click the page in the Pages palette that you want to move to. The page is centered within the document window.

  or

  Double-click the name of the spread to fit both pages in the document window.

TIP You can also scroll or use the Hand tool to move through the document.

You can also use the navigation controls if you don't mind moving down to the bottom of the document window.

To navigate using the window page menu:

- Click a page number in the window page menu to navigate through the document ⓬.

  or

  Enter a number in the Page field to move to a specific page.

To use the navigation controls:

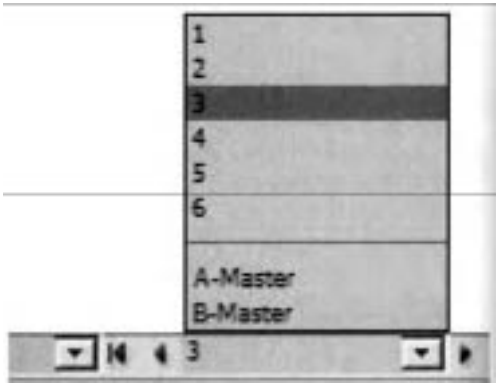
- Click each of the navigation arrows to move through the document ⓭.

You can also navigate using the commands in the Layout menu.

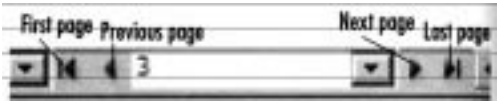
TIP The major benefit to using the Layout menu commands is that they can be applied using keyboard shortcuts. This makes it easy to move through the document when your hands are on the keyboard.

To navigate using the Layout menu:

- Choose one of the following:
  - Layout > **First** Page moves to the first page of the document.
  - Layout >Previous Page moves to the previous page.
  - Layout >Next Page moves to the next page.
  - Layout >Last Page moves to the last page of the document.
  - Layout >Next Spread moves to display the next spread of pages.
  - Layout >Previous Spread moves to display the previous spread of pages.
  - Layout > **Go** Back moves to the page that was previously active.
  - Layout > **Go** Forward moves to the page that was active before the Go Back command was applied.



⓬ *The* pop-up page list *at the bottom of the document let you navigate through the document.*



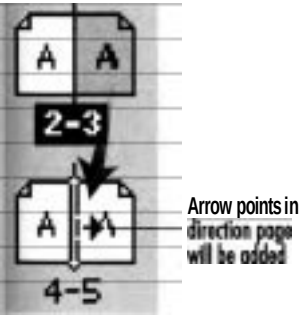
⓭ *Use the* navigation controls *at the bottom of the document window to move through the document.*

Which Pages are Shown in the Page List?

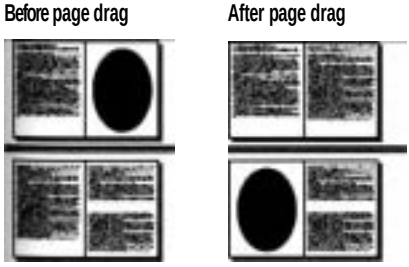
Normally, only 100 pages are seen in the page list. Documents with more than 100 pages will not display some pages. If you hold the Opt/Alt key as you open the Page list, you will see all the pages no matter how long the document is.

If you don't hold the Opt/Alt key, the list will always show the current page, the first and last pages, and five pages before and after the current page.

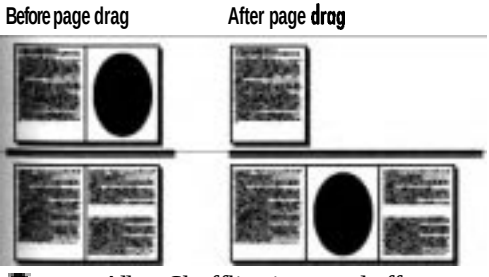
Once those pages are shown, the list displays all the pages in the document proportionally on either side of the current page. That means if the current page is closer to the end of the document, there will be more pages shown before the current page.



⓮ *Pages can be moved by dragging their icons in the Pages palette.*



⓯ *When* Allow Pages to Shuffle is turned on, *a page moved between two other pages forces one of the pages to the next spread.*



⓰ *When* Allow Shuffling is turned off, *a page moved between other pages is added between the two pages in the spread.*

You can also use the Pages palette to duplicate and delete pages from the document.

To duplicate pages:

1. Select the page or spreads you want to duplicate.
2. Drag the pages onto the New Page icon.

   or

   Choose Duplicate Spread from the Pages palette menu.

To delete pages:

1. Use the Pages palette to select the pages.

TIP Hold the Shift key to select contiguous pages. Hold the Cmd/Ctrl key to select non-contiguous pages.

2. Choose Delete Pages from the Pages palette menu.

   or

   Click the Delete Page icon at the bottom of the Pages palette ❶.

3. When the confirmation dialog box appears, click OK to confirm your choice.

TIP Hold the Opt/Alt key to bypass the confirmation dialog box.

You can control how pages are rearranged.

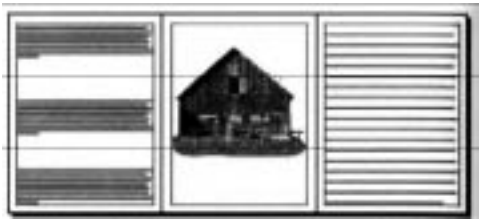
To rearrange pages in a document:

- Drag a page next to or between the pages of a spread as follows ⓮:
  - With Allow Pages to Shuffle turned on, the new page forces other pages to a new spread ⓯.
  - With Allow Pages to Shuffle turned off, the new page is added to the existing spread without moving the other pages ⓰.

TIP The arrow cursor indicates which side of a spine the new page is inserted ⓮.

Creating and Separating Spreads

Most documents are either single-page or facing-page documents *(see page 20)*. However, you can create spreads with more than one or two pages. These are ***island spreads*** like the fold-outs found in special issues of magazines ⓱.



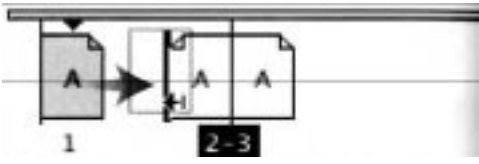
⓱ ***An example of how three pages can be put together to form an*** island spread.

To create an island spread:

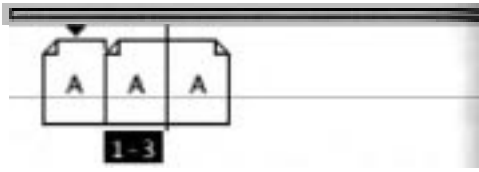
1. Deselect Allow Pages to Shuffle in the Pages palette menu.

TIP This command is turned off so that the pages that are already in the spread do not move to new positions.

2. Drag a page from the pages area, or a master page, next to the spread. *(See page 245 for working with masterpages.)*
3. Release the mouse when the vertical line appears next to the spread ⓲. This adds the page to the island spread ⓳.



⓲ ***The*** thick vertical line ***indicates that the new page will be added as an island spread.***



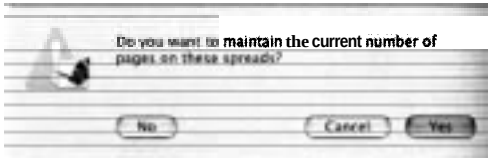
⓳ ***An example of an*** island spread ***in the Pages palette.***

To dismantle an island spread:

1. Drag each page outside the spread.

   or

   Choose Allow Pages to Shuffle from the Pages palette menu. **A** dialog box asks if you want to maintain the current number of pages in the spread ⓴.
2. Click the No button. This dismantles the island spread into the default number of pages per spread in the document.

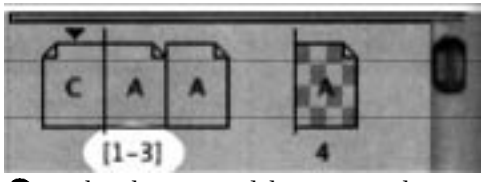


⓴ ***You can dismantle an island spread by changing the number of pages in the spread.***

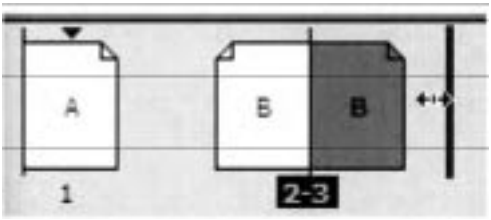
You can also control whether or not the pages in a spread are kept together or allowed to separate.

To keep the pages in a spread together:

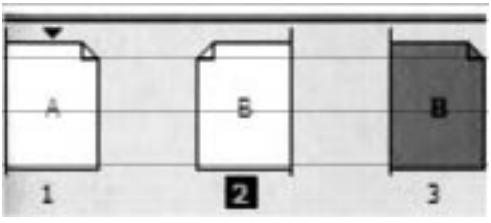
1. Select the spread you want to protect.
2. Choose Keep Spread Together from the Pages palette menu. Brackets appear around the page numbers ㉑. This prevents the spread from separating if you add pages.



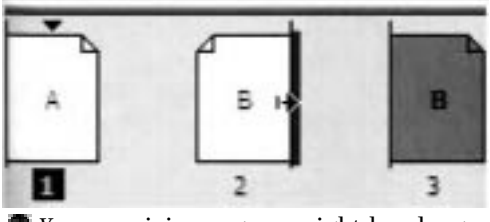
㉑ ***The*** brackets around the page numbers ***indicate that the Keep Spread Together option has been applied to the pages.***



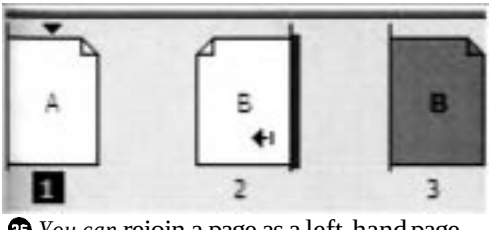
22 Drag a page outside a spread *to separate a page from the spine of the other page in the spread.*



23 *The results of* separating a page *from the spine of the otherpage in the spread.*



24 *You can* rejoin a page as a right-hand page by *dragging so that you see an arrow pointing to the right of the spine.*



25 *You can* rejoin a page as a left-hand page by *dragging so that you see an arrowpointing to the left of the spine.*

The reverse of keeping spreads together is to separate them from the spine. This is often used if you need to bleed artwork into the inside margin of a page. If the pages are not separated, artwork that bleeds from a left-hand page would appear on the right-hand page. When the pages don't touch at the spine, the bleed from one page doesn't appear on the other.

TIP This technique is also helpful if you want to rearrange pages as part of manually imposing them into printer spreads.

To separate spread pages:

1. Deselect Allow Pages to Shuffle in the Pages palette menu.
2. Drag a left-hand page to the left of the spread.

   or

   Drag a right-hand page to the right of the spread.
3. Release the mouse button when you see the vertical line outside the spread 22. The page will be separated from the other page in the spread 23.

To join pages together into a spread:

1. Deselect Allow Pages to Shuffle in the Pages palette menu.
2. Drag a page next to the spine of another page.
3. Release the mouse button as follows:
   - When you see an arrow at the spine point to the right, release the mouse button to create a right-hand page 24.
   - When you see an arrow at the spine point to the left, release the mouse button to create a left-hand page 25.

Importing Text

If you have a short amount of text, you can easily type it directly in InDesign's text frames. However, if you are working with long amounts of text, most likely you will want to import the text from a word processing program. You will also want to place the text so that it flows from page to page.

To import text:

1. Choose File >Place. The options for placing images are at the bottom of the Place dialog box ㉖.
2. Navigate to find the file you want to import.
3. Click Show Import Options to open the specific import options for that type of text file. ***(See the next two exercises for specifics on importing Microsoft Word and Microsoft Excel files.)***
4. Click Replace Selected Item to replace the contents of a selected text frame with the new text.
5. Click Open to load the text into a text cursor ㉗. ***(See page 240–243 for working with the text cursors.)***

TIP If you hold the Shift key as you click Choose, you open the Import Options dialog box even if the option is not checked.

TIP If the text file uses fonts not installed on your computer, an alert box informs you that the fonts are missing. ***(See page 352 for more information on replacing missing fonts.)***

㉖ *The* Import options *in the Place dialog box.*

㉗ *The* loaded text cursor *indicates that you can place the imported text.*

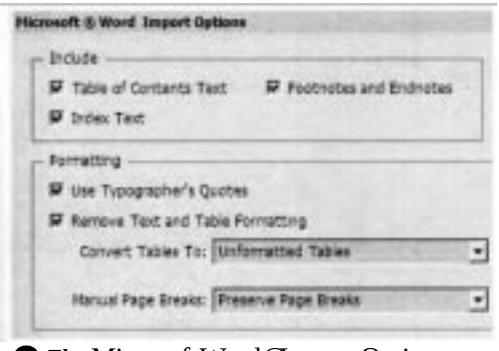
Importing Text Files

InDesign lets you import text files saved from Microsoft Word 98 or higher *(see the next page)*. You simply save the file and import it into InDesign.

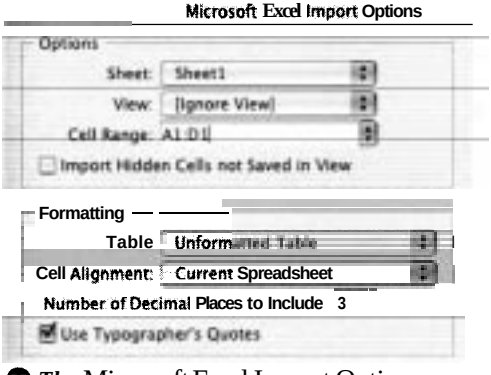
If you have an earlier version of Word, you should save the text as a RTF (rich text format) document. RTF files retain most of their original formatting and can be imported by InDesign.

InDesign can also import ASCII text— the most primitive computer text format. For example, when text is saved in the ASCII format, any italic or bold formatting is lost.

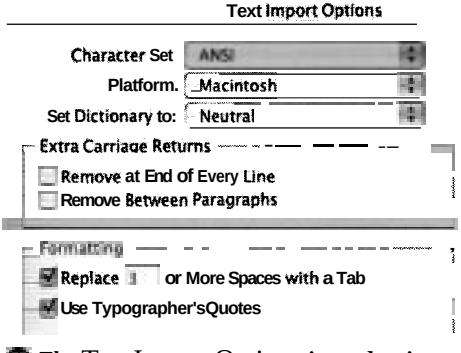
Although ASCII text is stripped down, it is useful for importing text from databases or internet sites. However, you do have to reformat any text imported in the ASCII format.



28 ***The*** Microsoft Word@Import Options dialog box ***is used to import Wordfiles.***



29 ***The*** Microsoft Excel Import Options dialog box ***is used to import Excel tables.***



30 ***The*** Text Import Options ***is used to import raw ASCII textfiles.***

The options for importing text change depending on which type of text file you choose to import.

To set the options for Microsoft Word files:

1. Choose Import Options to open the Microsoft Word® Import Options **28**.
2. Choose which parts of the document to include such as the table of contents, index, or footnotes and endnotes.
3. Choose how to convert manual page breaks that were inserted in the text.

TIP The import options for RTF files contain the same options as the Microsoft Word Import Choices.

To set the options for Microsoft Excel files:

1. Choose Import Options to open the Microsoft Excel® Import Options **29**.
2. Choose which parts of the spreadsheet, view, and cells you want to import.
3. Choose what formatting should be imported along with the cells.

TIP Excel files are imported as InDesign tables ***(see Chapter 13, "Tabs and Tables").***

To set the options for ASCII files:

1. Choose Import Options to open the Text Import Options **30**.
2. Choose the character set, platform, and dictionary to ensure that special characters are imported correctly.
3. Choose how to handle extra carriage (paragraph) returns at the end of lines and paragraphs.
4. Choose how to delete extra spaces inserted into the text.

TIP Most of the extra carriage returns and spaces are created when text is imported from Web pages.

Flowing Text

Once you have imported the text into the loaded text cursor (seepage *238)*, you can choose how the text flows into the document. This allows you to flow text and create pages at the same time.

To import text into a new frame:

- Drag the loaded text cursor to create a text frame that contains the text (31). The straight lines indicate the text will be placed into a new frame.

  or

  Click the loaded text cursor on the page. InDesign creates a text frame the width of the margins of the page.

TIP To unload the text cursor, choose any tool in the toolbox.

You can place text automatically into text frames that are master page items. This makes it easy to flow text from page to page.

To create master text frames:

- Choose Master Text Frame when you first create the document (32). This creates a text frame that fits within the margins of the master page.

To import text into an existing or master frame:

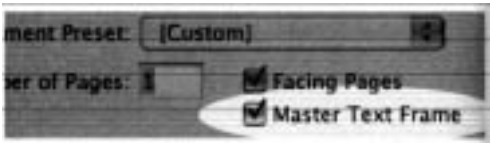
1. Move the loaded text cursor inside the frame.

TIP The text frame does not have to be selected.

TIP The curved lines around the cursor indicates that the text will flow into that frame (33).

2. Click the loaded text cursor inside the frame. The text flows into the frame.

(31) *The* straight lines around the loaded text cursor *indicates that the text will be placed into a new text frame.*



(32) *Apply the* Master Text Frame *option when you create a new document.*

(33) *The* **curved** lines around the loaded text cursor *indicates that the text will be placed into an existing frame.*

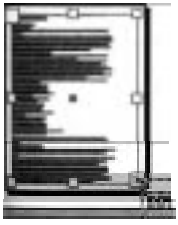
What Can You Do With a Loaded Cursor?

Once you load a cursor with text, it may seem like all you can do is click to place the text. However, there are some things you can do without losing the text loaded into the cursor. You can:

- Use any of the menu or Pages palette commands to add pages to the document.
- Use the keyboard shortcuts to zoom in or out.
- Use the scroll bars to move through the page or the document.
- Move the onscreen elements, such as the palettes, to new positions.

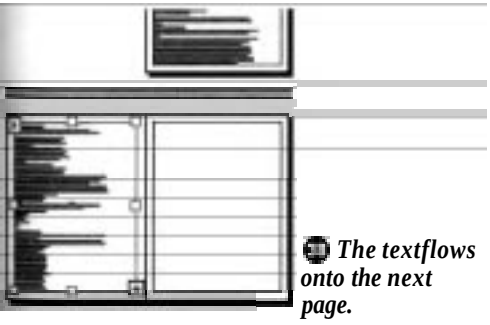
34 *Move the loaded cursor inside an existing or master frame to flow text onto a page.*

35 *If there is more text than can* fit *on the page, an overflow (plus sign) appears at the bottom of the frame.*



36 *Click the overflow symbol to manually load the overflow text into the cursor.*

37 *Click the link cursor to flow the text to the next page.*



38 *The textflows onto the next page.*

If you want, you can import many pages of text so they're linked from one page to another. There are several techniques for flowing the text. The manual method lets you choose exactly where the text should appear. For instance, you can use this method to place text onto non-contiguous pages.

TIP While it is possible to flow text from page to page without a master text frame, it is easier if you have chosen to use a master text frame.

To manually flow text:

1. Import the text so that you have a loaded cursor.
2. Move the cursor inside the area where the master text frame is located.

TIP The cursor displays curved lines when it is within the area of the master text frame **34**.

3. Click inside master text frame area. The text fills the frame. If there is more text, an overflow symbol appears at the bottom of the frame **35**.
4. Click the overflow symbol to load the overflow text into the cursor **36**.
5. Move to another page. The cursor changes to a link symbol **37**. Click to flow the text onto that page **38**.
6. If there is additional overflow text, repeat steps 3, 4, and 5 until all the text has been manually flowed onto the pages.

Flowing text manually is tedious and cumbersome. Rather than manually load the overflow text onto the cursor, you can use the semi-autoflow command to easily load the cursor with the overflow text.

To semi-autoflow text:

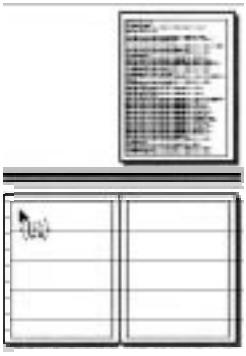
1. Import the text so that you have a loaded cursor.
2. Hold the Opt/Alt key to display the semi-autoflow cursor @.

TIP The cursor displays curved lines if you place it inside an existing frame 40.

3. Click inside an existing frame or drag to create a text frame. The semi-autoflow cursor automatically loads any overflow text into a new cursor which is available to be placed into a new frame 41.
4. Hold the Opt/Alt key and click or drag to create another text box linked to the first.
5. Repeat step 4 as many times as necessary to place all the text in the story 42.

39 *The* semi-autoflow cursors *let you flow text page by page.*

40 *The* semi-autoflow cursor *indicates that the text will automatically load any overflow into the text cursor.*



41 *After clicking with the semi-autoflow cursor the text is automatically loaded into a new cursor.*

42 *Each click with the semi-autoflow cursor loads the text onto new pages.*

43 *Use the* **autoflow** cursors *to create all the pages necessary to hold the imported text.*

44 *The* **autoflow** cursor *indicates that new pages will be created as the text is imported.*

45 *After clicking with the autoflow cursor new pages are created to hold the text.*

46 *Use the* fixed page **autoflow** cursors *to flow text only onto the number of existingpages.*

47 *The* fixed page **autoflow** cursor *indicates the text will flow only onto existingpages in the document.*

The semi-autoflow command may not be practical for flowing more than a few pages of text. If you have many pages of text, you can **automatically** flow the text and **create** new pages at the same time using the **autoflow** feature.

To autoflow pages with text:

1. Import the text so that you have a loaded cursor.
2. Hold the Shift key. This cursor changes to the **autoflow** text cursor 43.
3. Move the cursor over the area inside the margins of the page. The curved **autoflow** cursor appears 44.
4. Click the mouse button. This flows the text onto that page and creates as many additional pages as are necessary to hold all the text 45.

TIP Do not select the master text frame before you flow the text or you will lose the ability to **autoflow** the text.

What if you want to automatically flow text onto the existing pages of a document without adding any new pages? That's what the fixed-page flow cursor does. This allows you to import text onto a fixed number of pages and then format the text so that it fits within the fixed number of pages.

To flow text onto a fixed number of pages:

1. Import the text so that you have a loaded cursor.
2. Hold the Shift+Opt/Alt keys. The cursor changes to the fixed page **autoflow** cursor 46.
3. Click anywhere inside the margins of the page 47. This flows the text automatically onto as many pages as are in the document. If there is more text, an overflow symbol appears on the last page.

You can import dummy text into a frame instead of importing real text.

To add placeholder text:

1. Click inside a frame.
2. Choose Type > Fill with Placeholder Text. The dummy text fills the frame ⓫.

TIP You can use text for the placeholder by saving a file named placeholder.txt in the InDesign application folder.

Lore dionsectet, velit num nit prat verosto eu facin ullan ex ex ero enis at. Duisismod lesequamet eum delisim nisl exeriureet acing ercilla alissed tat.

Lor ad te mincillan hendre feugiat praestio ea amet ip estrud dit in hendignis enim delenim ver sit velisi bla feugue delesequipit ulluptat alis nostrud doluptat. Ut prat luptat alit

⓫ *A sample of the* **placeholder text** *that* **is** *used to fill textframes.*

Creating Text Breaks

InDesign has special characters that force the text to break to a new position.

To insert break characters:

1. Place the insertion point where you want to jump to the next location
2. Choose Type > Insert Break Character.

   or

   Control-click (Mac) or right-mouse click (Win) to choose Insert Break Character from the contextual menu.
3. Choose one of the following from the Insert Break Character menu:

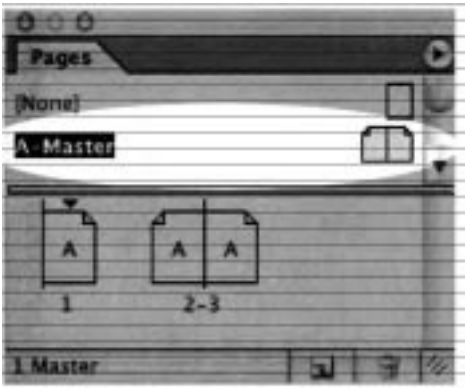
Insert Break Character Shortcuts

Use the following shortcuts to insert break characters:

- Enter inserts a column break.
- Shift-Enter inserts a frame break.
- Cmd-Enter (Mac) or Ctrl-Enter (Win) inserts a page break.

Break character	Description	Symbol in text
Column break	Jumps text to the next column. If there is no column in the frame, the column break forces the text to the next page.	
Frame break	Jumps text to the next frame.	
Page break	Jumps text to the next page.	
Odd page break	Jumps text to the next odd page.	
Even page break	Jumps text to the next even page.	

TIP To see a representation of the break characters, choose Type > Show Hidden Characters.



Double-click a masterpage in the Pages palette to view that master page in the document window.

Working with Master Pages

Every new document includes a master page. When you add objects to the master page, they appear on all the document pages based on that master page.

To add objects to a master page:

1. In the Pages palette, double-click the name of the master page. This opens the master page in the document window.
2. Add text boxes, graphics, or any other elements you want on the master page.

TIP If the document has been set for facing pages, there are two sides to the master page, left-hand and right-hand. The left-hand master page governs the left-hand document pages. Similarly the right-hand master page governs the right-hand document pages.

3. Double-click the name of the document page to make it the active page. Any items placed on the master page now appear on the document page.

TIP Reopen the master page to make any changes to the master-page elements. Those changes appear on the document pages.

Uses for Master Pages

Master pages allow you to automate page layout changes. For instance, if you have a hundred-page book, you wouldn't want to have to draw a text frame on every page and type the name of the chapter or book title.

Master pages allow you to place an object or frame on the master page and have it appear on all the document pages.

If you place an object on the master page, it will always be positioned in exactly the same spot on every page that has that master applied.

You can also use master pages to store design alternatives such as different column layouts or margin settings.

Think of master pages as the style sheets for pages.

You can have many master pages in a document. This allows you to have different layouts for different parts of your document.

To create new master pages:

1. Choose New Master from the Pages palette menu. This opens the New Master dialog box 90.
2. Choose a letter for the prefix for the master page.

TIP The prefix is the letter that appears inside the pages that have that master page applied to them.

3. Enter a name for the master page.
4. Use the pop-up menu to set which master page, if any, the new master page should be based on.

TIP Basing one master page on another allows you to make changes on one master page that are applied to the other.

5. Enter the number of pages for the master. This allows you to create spreads that serve as master pages.

TIP To create a new master page without opening the New Master dialog box, hold the Cmd/Ctrl key and click the New Page icon at the bottom of the Pages palette.

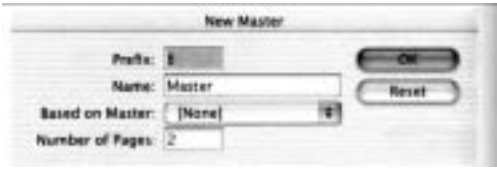
As you work, you might want to convert a document page into a master page. InDesign makes it easy to turn a document page into a master page.

To convert a document page to a master page:

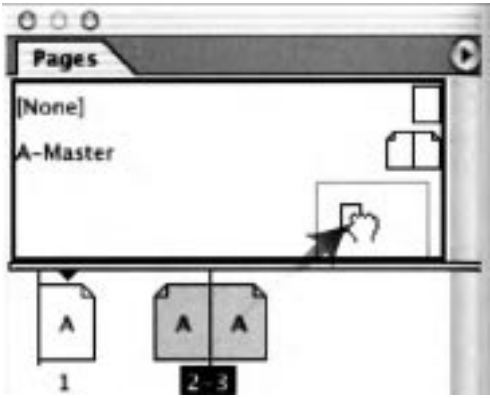
1. Select the page or pages.
2. Drag the page or pages from the document area to the master page area 91.

   or

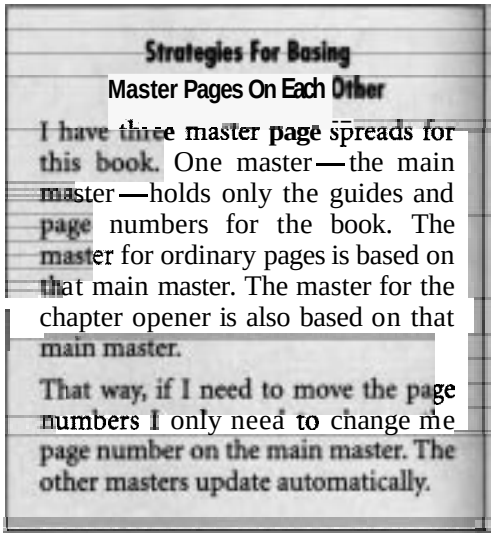
   Choose Save as Master from the Pages palette menu.



90 *The* New Master dialog box *allows you to set the attributes for the master page.*



91 *Drag a documentpage into the masterpage area to convert the document page to a master.*



Strategies For Basing Master Pages On Each Other

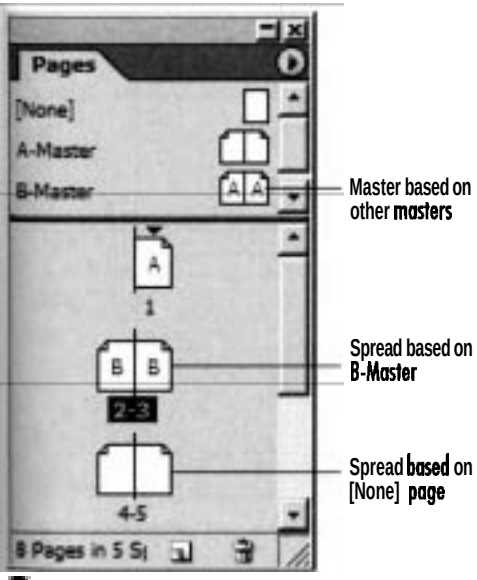
I have three master page spreads for this book. One master—the main master—holds only the guides and page numbers for the book. The master for ordinary pages is based on that main master. The master for the chapter opener is also based on that main master.

That way, if I need to move the page numbers I only need to change the page number on the main master. The other masters update automatically.

52 *The* Apply Master dialog box *allows you to change the master that governs pages.*

53 The rectangle around the single page *indicates that the master will be applied to that page only.*

54 **The** rectangle around the spread *indicates that the master will be applied to the spread.*



55 *The letters inside the page icons indicate what masters are applied to pages or other masters.*

New pages are based on the master page applied to the last existing page of the document. You can easily change the master page that governs pages.

To apply a new master to a page:

1. Select the page or pages.
2. Choose Apply Master to Pages from the Pages palette. This opens the Apply Master dialog box 52.
3. Use the Apply Master menu to apply a master to the pages.
4. Use the To Pages field to change the selected pages.

TIP Selecting None creates pages that have no master page applied.

To apply masters with the Pages palette:

- Drag the master page onto the document pages as follows:
  - To apply to a single page, drag the master page icon onto the page. A rectangle appears around the page 53.
  - To apply to a spread, drag the master page icon onto the spread. A rectangle appears around the spread 54.

You can also base one master page on another using the Pages palette.

To base masters on existing masters:

1. Create a new master or spread.
2. Drag one master page onto another.
   - To base the spread on the master, drag the master onto the spread.
   - To base one page on the master, drag the master onto a single page.
3. Release the mouse button. The prefix of the master appears inside the second master page 55. The prefix indicates that the master page governs the other master page.

Ordinarily you modify the elements of a master page only on the master page itself. The elements on the document pages are protected from being selected or modified. However, you can release that protection and modify the master elements by creating local overrides.

To modify master elements on document pages:

1. Hold Cmd/Ctrl-Shift and click the element you want to modify. This releases the protection and selects the element.
2. Make any local override changes to the element.

TIP An object can still have some links to the master page even if local overrides have been applied *(see "Overriding Master-Page Elements" on this page)*.

You might want to modify all the master elements on a page. Rather than release each item on by one, InDesign lets you do it with a single command.

To release all master elements on a page:

- Choose Override All Master Page Items from the Pages palette menu. This releases the objects so they can be modified on the document page.

Once you have created a local override on a master page element, it may still have links to the original master page item. If you want, you can completely sever all ties between the master page item and the item on the document page.

To separate an item from the master item:

1. Select the object that has been released from the master page.
2. Choose Detach Selection From Master in the Pages palette menu. Any changes you make on the master page will no longer be applied to that object.

Overriding Master-Page Elements

If you modify a master-page element on a document page, the local override loses its link to the master-page element. However, the element may have partial links to the master-page element.

Let's say you add a stroke to an object on the' document page. From that point on, the stroke of the element is removed from the control of the element on the master page.

But, the element on the document page is allowed to move if you move the element on the master page. Also, the fill color of the elements changes if you change the master-page element. Only the formatting for the stroke is separated from the master-page element.

How Many Master Pages?

While it may seem like a lot of work to set up master pages, the more masters you have the easier it is to lay out complicated documents.

A weekly magazine can easily have fifty or more master pages—some for special editorial spreads and others for different types of advertising spaces.

Some publishers insist that every page must be based on a master and do not allow any modifications of the master-page elements. Others let the designers override the master pages.

You decide which way suits your work habits and the project.

Stacking Order of Master Page Items

The items on the master page are always behind any new items you may put on a page. But when you release the master page items from the master page, they always spring to the front of the document page.

If you want, you can use the Object > Arrange menu to change the stacking order of the items. However, if you release many items on many pages, it may seem cumbersome to move them backwards.

Instead, create two layers in your document (see Chapter 11, "Layers"). Put all the master page elements on the bottom layer, and your regular document objects on the top layer. That way when you release the master page items, they will not move in front of your regular page items.

Of course you can also separate **all** the objects on a page from their links to the master page items.

To separate all the master items on a page:

1. Use the command, Override All Master Page Items, to first release all the master page items from the master page.
2. Choose Detach All Objects From Master in the Pages palette menu. This severs any remaining link between the item and the master page.

TIP Only those items that were released from the master page can then be detatched from the master page. If an item is unreleased from the master page, it cannot be detatched.

You can also hide master page items on document pages so they do not print.

To change the display of master page items:

- Choose View > Display Master Items. This unchecks the command.

TIP When the command is unchecked the master page items are hidden.

InDesign also lets you quickly clear all local overrides and reapply the master page items to the document page.

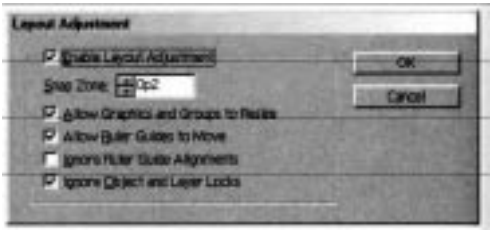
To remove local overrides and reapply the master:

- Choose Remove All Local Overrides in the Pages palette menu. All local override elements will be deleted and the master page items will be reapplied.

Adjusting Layouts

You certainly are not expected to set layouts perfectly the first time, every time. Fortunately, InDesign has a powerful layout adjustment feature that moves and resizes objects as you change the page size or margins.

Once layout adjustment is turned on, any changes to the layout will alter the position of the elements on both the master pages and document pages.

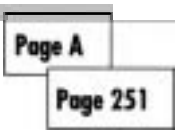


The Layout Adjustment dialog box ***controls which elements change if you change document attributes such as the page size or margins.***

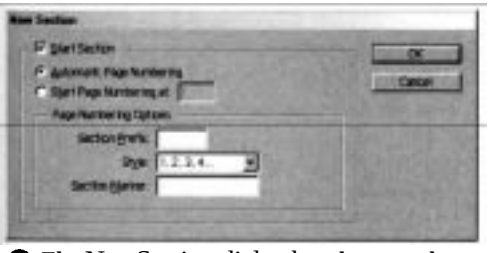
To set the layout adjustment options:

1. Choose Layout >Layout Adjustment. This opens the Layout Adjustment dialog box.
2. Check Enable Layout Adjustment so that elements change position when page size, orientation, margins, or columns are changed.
3. Set a value for the Snap Zone to specify how close an object must be before it will align and move to a margin or column guide, or page edge.
4. Check Allow Graphics and Groups to Resize so that elements change size as well as move during the adjustment.
5. Check Allow Ruler Guides to Move to have ruler guides move as part of the layout adjustment.
6. Check Ignore Ruler Guide Alignments to keep objects from moving along with ruler guides.
7. Check Ignore Object and Layer Locks to move objects that are locked or on locked layers.
8. Click OK to set the options. The document will change according to the new settings when the document setup or margins are changed.

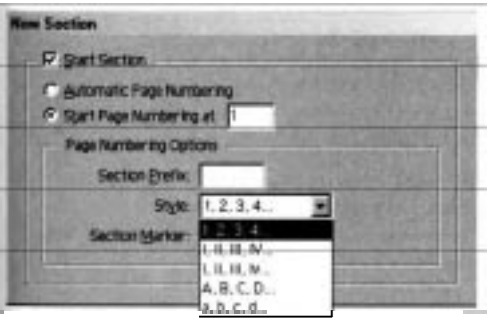
The effect of changing the margins and page size when Enable Layout Adjustment ***is turned on.***



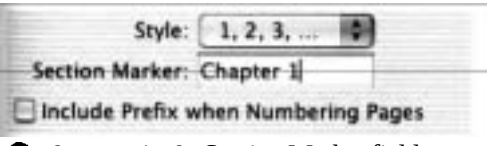
58 *The* auto page number character *appears as a letter on master pages but as a number on documentpages.*



59 *The* New Section dialog box *lets you change the formatting and numbering ofpages.*



60 *The* Style menu *allows you to choose different formats for page numbering of a section.*



61 *The entry in the* Section Marker field *allows you to create custom labels forpages.*

Working with Page Numbers

The most common element that is added to a master page is the page-number character.

To add automatic page numbering:

1. Draw a text frame on the master page where you want the page number to appear.
2. Choose Type >Insert Special **Character >** Auto Page Number. This inserts a special character in the text frame 60.

TIP The auto page number character is the prefix for the master page *(see page* 246).

3. If the master page is a facing-page master, repeat steps 1 and 2 for the other side.

You may want to change the format of page numbers or the number they start from. You do that by creating a new ***section.***

To create a document section:

1. Move to the page where you want the section to start.
2. Choose Section Options from the Pages palette menu. The New Section dialog box appears 59.
3. Check Start Section to open the options.
4. Type the label (up to five characters) for the section in the Section Prefix field.
5. Use the Style pop-up list to set the format for the numbering 60.
6. Choose the Page Numbering options:
   - Automatic Page Numbering continues the count from the previous pages.
   - Start Page Numbering At lets you enter a specific number to start the section from.
7. Enter a entry for the Section Marker 61. ***(See the steps on the next page for how to work with the Section Marker.)***

Once you have created a entry for the Section Marker *(see previous page)* you need to insert a section marker character to see the entry on document pages.

To add a section marker character:

1. Place the insertion point in a text frame where you want the section marker to appear.

TIP The text frame can be on a master page or a document page.

2. Choose Type >Insert Special Character and then choose Section Name from the menu.

TIP If the text frame is on the master page, the word Section appears on the master page. If the text frame is on the document page, the entry for the Section marker appears (63).

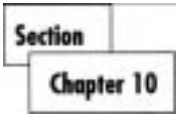
You can also insert special characters that create jump lines that show the page where the text flow continues to or from.

To create a continued to/from page number:

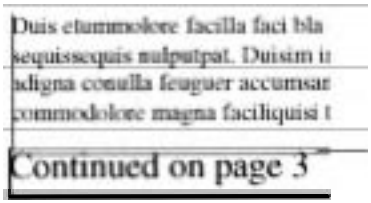
1. Place the insertion point in a text frame that touches the frame that holds the story.
2. Choose Type >Insert Special Character and then choose one of the following:
   - Next Page Number inserts the page number that the text jumps to or continues on (64).
   - Previous Page Number inserts the page number that the text continued from (64).

TIP The continued to/from character needs a separate text frame so that if the text reflows, the continued to/from character doesn't move along with the text.

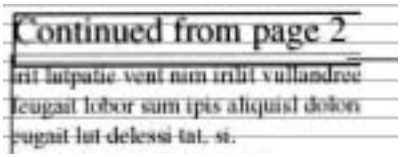
TIP The continued to/from characters only insert the page number. You have to type "Continued on" or "Continued from" yourself.



The section marker ***appears as the word Section on master pages but as the label on document pages.***



(63) ***The*** Next Page Number character ***shows the page number that the story is continued on. The overlapping area is where the page number frame touches the story frame.***

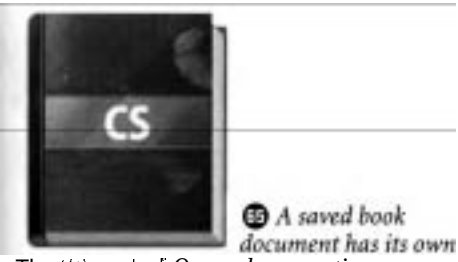


(64) ***The*** Previous Page Number character ***shows the page number that the story comes from. The overlapping area is where the page number frame touches the storyframe.***

Absolute or Section Numbering?

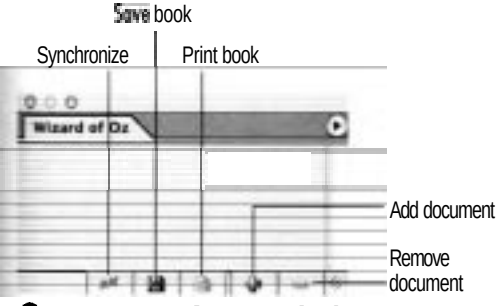
What if you create a document that has its first section start on page i and then starts a new section that starts on page 1? This could create some confusion if you try to print page one. Which one would you print?

Fortunately, InDesign has a preference setting that allows you to change the section numbering to absolute numbering *(see page 485)*. This makes it easier to avoid confusion if a document has multiple sections that start with the same number.

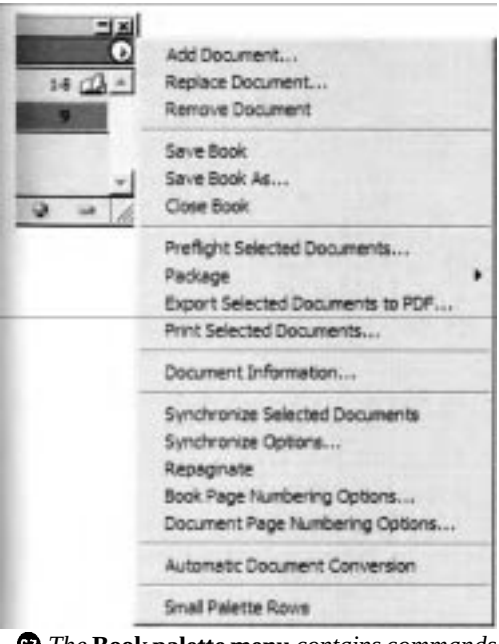


The Wizard of Oz

65 *A saved book document has its own documenticon.*



66 *An empty* **Book palette** *displays the name of the book on its palette tab.*



67 *The* **Book palette menu** *contains commands for working with books and book documents.*

Making Books

Most people who create long documents break them up so that each chapter is contained in its own document. They need a way to coordinate the page numbers, colors, and styles. An InDesign book is an electronic file that keeps track of all those documents.

To create an electronic book file:

1. Choose File > New > **Book.**
2. Use the dialog box to name the book document and save it in a location **65**. The Book palette appears **66**.

TIP The tab for the Book palette contains the name of the book.

Once you have created the book file, you can then add documents that make up the book.

TIP You don't have to create the book file first. For instance, I created these chapters before I added them to a book document.

To add documents to a book:

1. Click the Add document button at the bottom of the Book palette.

   or

   Choose Add Document from the Book palette menu **67**.
2. Use the dialog box to find the document you want to add to the book. The name of the chapter appears in the Book palette.
3. Repeat steps 1 and 2 to add other documents to the book.

To remove documents from a book:

1. Select the documents you want to remove.
2. Click the Remove document button at the bottom of the Book palette.

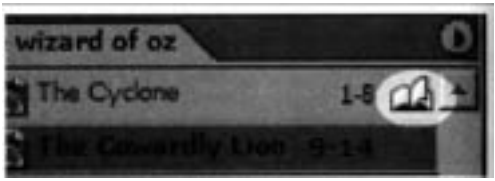
   or

   Choose Remove Document from the Book palette menu.

You can use the Book palette and Book palette menu to open, rearrange, and control the documents that make up the book.

To open documents in a book:

- Double-click the name of a document in the Book palette. The open book symbol next to the name indicates that the document is open.



The open *book* icon *indicates that a document of the book is open.*

The order that documents are listed in the Book palette determines the page numbers of the book.

To change the order of the documents in a book:

- Drag the name of a document in the Book palette to a new position in the palette.

Drag a listing in the **Book** *palette to change the order that the document appears in the* ***book.***

One of the benefits of creating a book document is that you can have one **file** control the style sheets *(see page* 328**)** and colors *(see Chapter 5, "Working in Color")* for the other documents in the book. If you make changes to the style source file all the other files synchronize to that file.

To set the style source for a book document:

- Click the Style Source box next to the name of the file that you want to control the rest of the documents in the book.

To synchronize files to the style source:

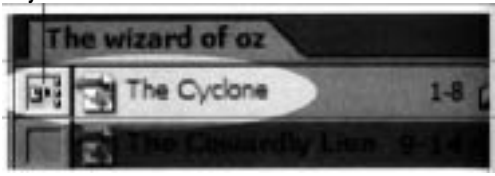
- Click the Synchronize button in the Book palette.

  or

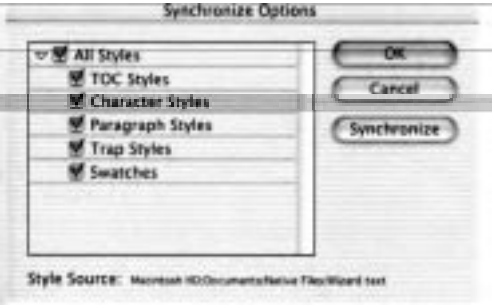
  Choose Synchronize Book in the Book palette menu.

TIP The menu command says Synchronize Selected Files if only some of the files in the book are selected.

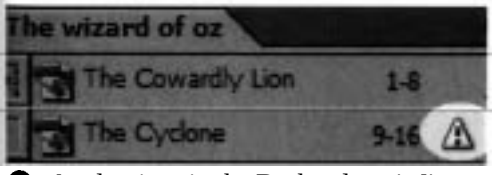
Style source **icon**



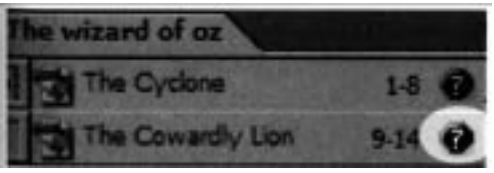
The style source file *is used to synchronize the style sheets and colors for other documents in a book.*



71 ***Use the*** Synchronize Options dialog box ***to set which attributes of the style sourcefile will be applied to the files in the book.***



72 ***The*** alert icon in the Book palette ***indicates that*** *the file* ***has been*** *modified.*



73 ***The*** missing icon in the Book palette ***indicates that*** *the file* ***has been moved after it was imported into the book.***

To set the synchronizing options:

1. Choose Synchronize Options from the Book palette menu. The Synchronize Options dialog box opens 71.
2. Choose the options that you want to apply from the style source document.

If the book is closed when you modify the files in the book, you need to update them when you do reopen the book document.

TIP This step is not necessary if you modify book files while the book document is open.

To update files in a book:

1. Choose File >Open and then navigate to the book document you want to work on.
2. Use the Book palette to open, then modify any files in the book document. An alert icon appears next to the modified files 72.

   or

   Use the Open command in the File menu to open, then modify any files in the book document.
3. If necessary, synchronize the files to the style source document ***(see previous exercise).***

You can also replace missing files in a book or swap one file for another.

TIP A missing icon indicates that the file has been moved after being added to the book 73. The Replace command lets you relink the missing file to the Book palette.

To replace a file in a book:

1. Select the file in the Book palette that you want to replace.
2. Choose Replace Document from the Book palette menu.
3. Navigate to find the file you want to replace or relink.
4. If necessary, synchronize the files.

Files in a book automatically run in consecutive numbers. As you add or delete pages in one document, the page numbers in the rest of the book adjust. You control how the page numbers are adjusted.

To set how page numbers are adjusted:

1. Choose Book Page Numbering Options from the Book palette menu to open the dialog box 74.
2. Choose the Page Order options as follows:
   - Continue from previous document starts new pages sequentially from the end of the previous listing.
   - Continue on next odd page always starts new pages on an odd number.
   - Continue on next even page always starts new pages on an even number.
3. If using the odd or even options results in a skipped page, check Insert Blank Page to insert a page.
4. Deselect Automatic Pagination to stop InDesign from automatically numbering the files in a book.

To set the numbers for each document in a book:

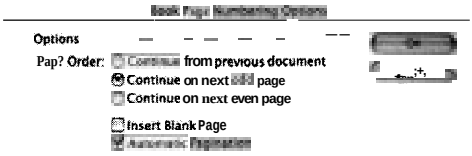
1. Choose Document Page Numbering Options from the Book palette menu to open the dialog box 75.
2. Choose Automatic Page Numbering to number pages as they appear in the Book palette.

   or

   Choose Start Page Numbering At to set a specific page number to start that document on.
3. Set the rest of the options as described on page 251.

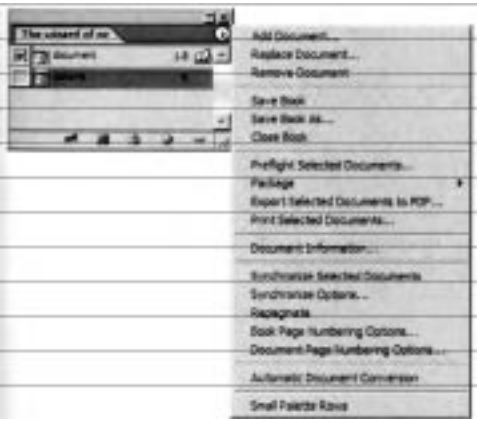
To force the pagination in a book:

- Choose Repaginate from the Book palette menu.

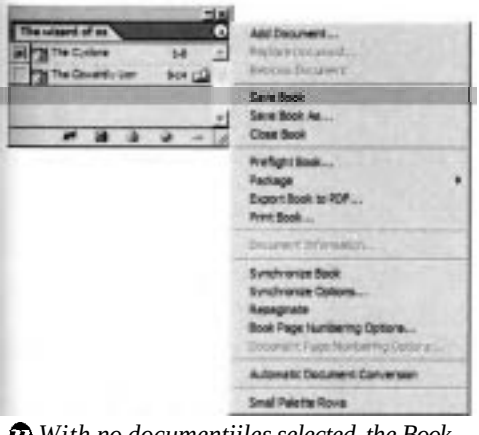


74 ***Use the*** Book Page Numbering Options dialog box ***to set how pages shall be numbered in a book.***

75 ***Use the*** Document Page Numbering Options dialog box ***to set how an individual document is numbered in a book.***



If you select individualjiles in the Book palette list, the Book palette commands are applied to only the selected files.



With no documentjiles selected, the Book palette commands are applied to all the book files.

The Book palette also lets you apply printing and output commands to all the files in a book.

To print a book:

- Choose Print Book from the Book palette menu. *(See Chapter **18,** "Output," for more information on printingfiles.)*

  or

  Click the Print icon in the Book palette.

To preflight a book:

- Choose Preflight Book from the Book palette menu. *(See page **444** for more information on the prefight command.)*

To package a book:

- Choose Package Book from the Book palette menu. *(See page **447** for more information on the package command.)*

To export the book files as a PDF:

- Choose Export Book to PDF from the Book palette menu. *(Seepage **451** for more information on the exporting as a PDE)*

The Book palette menu commands change depending on which files are selected in the Book palette .

To control what parts of a book are changed:

- Select the files in the book as follows:
  - Hold the Shift key and click to select contiguous files.
  - Hold the Cmd/Ctrl key and click to select non-contiguous files.
  - Click the area below the files to deselect the file. This applies commands to all the files in the book .

Creating a Table of Contents

InDesign creates a table of contents (TOC) by looking at the styles applied to paragraphs and then listing the text and page numbers for those paragraphs. The TOC for this book lists the chapters and the section heads 78.

To prepare a document for a table of contents:

1. Add the page or pages that will hold the TOC.

TIP Most tables of contents are part of the front matter of a book and are numbered separately without affecting the regular page numbering.

TIP If the document is part of a book, make sure the book's pagination is current.

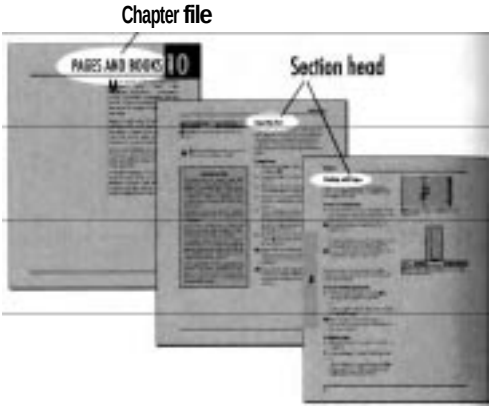
2. Apply paragraph styles to the paragraphs that you want to appear in the TOC. *(See page 328 for more information on paragraph styles.)*

To define the styles for TOC entries:

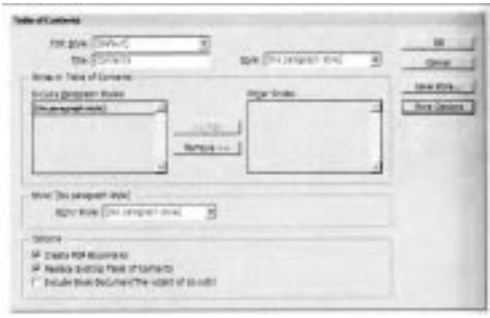
1. Choose Layout >Table of Contents to open the Table of Contents dialog box 79.
2. Set the Title and Listing controls as described in the exercises that start on the next page.
3. Click Save Style. This opens the Save Style dialog box 80.
4. Name the style and click Save.

To generate the TOC:

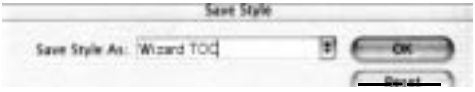
1. Choose Layout >Table of Contents to open the Table of Contents dialog box.
2. Set each of the controls as described in the following exercises.
3. Click OK. This closes the dialog box and creates a loaded text cursor that contains the TOC.
4. Click or drag the loaded cursor to apply the TOC text where you want it to appear in the document.



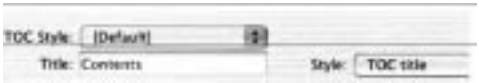
78 *The paragraph styles applied to chapter titles and section heads in this book can be used to create a table of contents.*



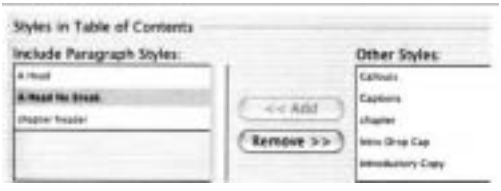
79 ***The*** Table of Contents dialog box *lets you select and format listings for a table of contents.*



80 *The* Save Style dialog box *lets you save the settings from the Table of Contents dialog box.*



81 *Use the* Title field in the Table of Contents dialog box *to enter the text you want to appear before the listings.*



82 *Move styles from the Other Styles list to the* Include Paragraph Styles list *to choose which paragraphs are added to the table of contents.*

Benefits of an Automatic TOC

If all this seems like too much work just to create a short table of contents, you may be tempted to create one by hand—manually entering the items in the TOC.

For instance, I could easily create the TOC for this book by hand.

But there is a big benefit in creating an automatic TOC. When you export PDF files with an automatically created TOC, they will have hyperlinks from the TOC to the document pages. *(See Chapter 17, "Interactive PDF Elements" for more information on adding hyperlinks and other interactive elements to InDesign files.)*

This means someone reading the PDF document can just click on the page number listed in the TOC to go to that specific page. Without the electronic TOC, you'd have to manually add all those links in Acrobat.

The title is the label that is applied before each entry in the table of contents. You can set the type for the title as well as the paragraph style that formats the title.

To enter the title of the table of contents:

1. Type the text for the title in the Title field 81.
2. Use the Style menu to the right of the Title field to choose which paragraph style is applied to format the title.

You choose the entries for a table of contents by selecting the paragraph style sheets that were applied to those sections of your documents.

To choose the listings for the table of contents:

1. Select a paragraph style listed in the Other Styles area of the Table of Contents dialog box 82.
2. Click the Add button. This moves the style to the Include Paragraph Styles list.
3. Repeat steps 1 and 2 for any additional styles.

Most likely you will want to format the entries in a table of contents with a different style than the one used within the document.

To format the entries in the table of contents:

1. Select the entry listing in the Include Paragraph Styles area.
2. Choose a paragraph style sheet from the Entry Style menu under the Style: [Name] in the Table of Contents dialog box 83.
3. Repeat steps 1 and 2 for any additional styles.

83 *Use the* Entry Style menu *to choose a style sheet that you have created to format the listing as it should appear in the table of contents.*

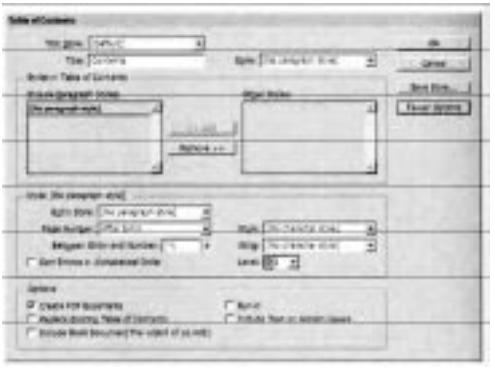
The Table of Contents dialog box has additional controls for more advanced options such as formatting the page numbers for each entry.

To open the additional table of contents controls:

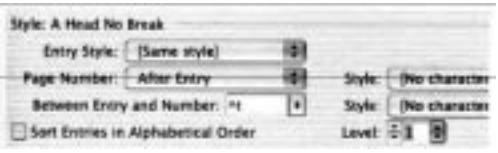
- Click the More Options button in the Table of Contents dialog box 84. This opens the advanced options at the bottom of the dialog box 85.

TIP If the button says Fewer Options, then the dialog box already shows the advanced options.

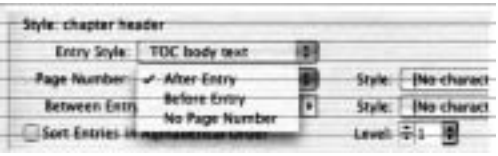
84 *Click the* More Options button *to expand the controls in the Table of Contents dialog box.*



85 *The* Table of Contents dialog box *with all the options available.*



86 ***The*** Style options area ***gives you controls to format how the entries are formatted and arranged in the TOC.***



87 ***The*** Page Number menu ***controls where the page number will appear in the TOC listings.***

Other Uses for a Table of Contents

You're not limited to using the Table of Contents commands just for listings of chapters and section heads.

If you have a sales catalog you can use the commands to create a list of all the items, which can be used as a price list. I could generate a separate file for this book that lists all the titles for sidebars such as this one. In a book of illustrations, you can use it to create a list of names of all the artists for each illustration.

The only thing you need to remember is to assign a style sheet to each item that you want to appear in the table of contents.

With the advanced options open, you have additional controls for the Style for each entry in the TOC **85**. This gives you greater control over where the page numbers appear and how they are formatted.

To set the advanced Style options for each entry:

1. Choose one of the styles in the Include Paragraph Styles list ***(on page 328).*** The style name appears in the Style options area.
2. If you have not already applied a listing from the Entry Style menu, do so as explained on the previous page.
3. Use the Page Number menu to choose a position for the entry's page number **87**:
   - After **Entry** positions the number after the entry.
   - Before **Entry** positions the number before the entry.
   - No Page Number lists the entry without any page number.
4. If desired, choose a character style for the page number from the Style list to the right of the Page Number menu.

TIP The character style lets you apply formatting to the page number for each entry. (See ***page 333 for working with character styles.)***

You can also control how the entry name and the page number are separated from each other.

To control the separator character:

1. Select one of the character options from the Between Entry and Number menu **88**. The character symbol appears in the field.
2. If you want, type additional text before or after the character symbol. This lets you add a label before the page number.
3. If desired, apply a style from the Style menu for the Between Entry and Number character **85**.

A table of contents doesn't have to be organized in the order that the items appear.

To alphabetize the table of contents:

- Check Sort Entries in Alphabetical order from the advanced options area ⓫.

To indent the entries in a table of contents:

- Use the Level controls to indent each table of contents entry ⓬.

TIP Each entry in the Include Paragraph Styles is automatically indented. This is for display purposes in that dialog box and does not affect the final TOC.

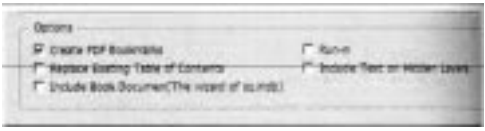
There are additional options you can set for a table of contents ⓭.

To set the table of contents options:

- Select each of the table of contents options at the bottom of the Table of Contents dialog box as follows:
  - Create **PDF** Bookmarks adds bookmarks to the PDF that is created from the TOC. This is in addition to any hyperlinks within the TOC.
  - Replace Existing Table of Contents lets you update or change the table of contents that has already been placed in the document.

TIP This option is only available if a table of contents has already been generated.

  - Include Book Documents lets you create a table of contents for all the documents in a book.
  - Run-in creates a single paragraph table of contents with each entry divided by a semi-colon (;) and a space.
  - Include Text on Hidden Layers uses text that is on layers that are not visible. ***(See the sidebar on this page for how this could be used.)***



⓫ ***The TOC* Options *area lets you control more of the table of contents.***

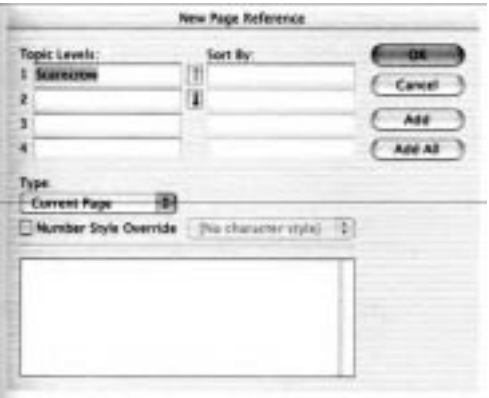
A TOC of Non-Existing Items

The following tip comes from *Real World InDesign CS* by Olav Martin Kvern and David Blatner. I strongly recommend this book for anyone who wants a deeper understanding of InDesign.

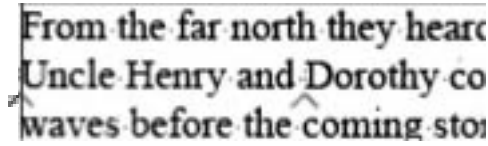
The items in a TOC don't have to be from items that are visible on each page. For instance, let's say you want a list of all photographers in your book and where their pictures appear. Simply put the names of the photographers next to their photos, but set the names to not print *(see page 418)* or on a layer set to not print *(see page 269)*.

Then, run the TOC for the items. You get a list of the photographers names, even though those names don't actually appear on the printed pages.

89 ***The*** Index palette ***lets you define those items that should be part of the index.***



90 ***Use the*** New Page Reference dialog box ***to add specific index entries to the Index palette.***



91 ***An*** index reference marker ***is visible in the text when Show Hidden Characters is chosen.***

Creating an Index

There are different ways to create an index in InDesign. The simplest way is to add index references to the words or phrases you want to appear in the index.

TIP The following exercises are just the start of working with indexes. For more information, see ***Real World InDesign CS*** published by Peachpit Press.

To apply an index reference to text:

1. Highlight the text entry that you want to be indexed. For instance, if you want to find all instances of Aunt Em in the Wizard of Oz, you would highlight a single instance of "Aunt Em" in one place.
2. Choose Window>Type & Tables>Index to open the Index palette **89**.

TIP The palette does not show the alphabet until you have already entered one reference.

3. Click the Reference button at the top of the palette.
4. Click the New Index entry or choose New Page References in the Index palette menu. The New Page Reference dialog box appears **90**.
5. Click the Add button to add just that instance of the text to the Index palette.

   or

   Click the Add All button to add all the instances of the text to the Index palette.
6. Click OK to return to the document. An index reference marker appears before the referenced text **91**.
7. Repeat these steps for each entry that you want added to the Index palette.

TIP The Index palette shows referenced text along with the page numbers that the text appears on.

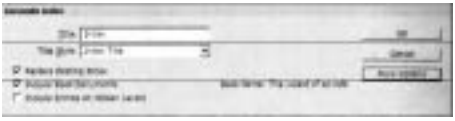
Once you have all the index references in the document, you can then generate the index text file.

To generate an index file:

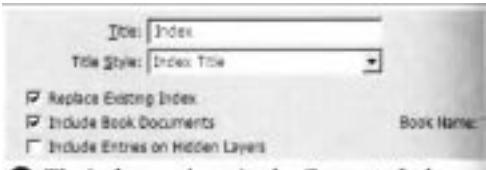
1. Click the Generate Index button.

   or

   Choose Generate Index from the Index palette menu. The Generate Index dialog box appears 92.
2. In the Title field, enter the text that you want for the title of the index 93.
3. Use the Title Style menu to choose a paragraph style for the formatting of the title of the index.
4. If you have already created an index, check the Replace Existing Index to replace the original index.
5. If the document is part of a book, check Include Book Documents to add those documents to the index.
6. Check Include Entries on Hidden Layers to include the text on hidden layers in the index.
7. Click OK. This closes the dialog box and creates a loaded text cursor that contains the index.
8. Click or drag to apply the index text where you want it to appear in the document.



92 *The* Generate Index dialog box *lets you create the index textfile.*



93 *The* index options *in the Generate Index dialog box.*

The Art of an Index

An index is much more than just a list of entries in a document. There is an art to creating a good index. You need to understand the meaning of the index entries and anticipate the items readers will want to search for.

Quite frankly, most designers are not prepared to create a truly elegant and useful index. In fact, I hire a professional indexer who reads my books and creates an index for me. The result is not electronic, but I wouldn't do it any other way. Thanks Steve!

11 LAYERS

When I was in advertising, we used to lay clear acetate sheets over our mechanical board as a way to create variations for our layouts. One acetate layer might have copy and prices for a test market newspaper ad. Another piece of acetate might have prices for a special Sunday-circular ad. Yet another might have copy without prices for the national magazine ads. The artwork and other graphics stayed on the bottom layer and were visible through the acetate layers.

When the mechanical was sent to be printed, the print shop workers flipped the different acetate sheets on or off the board to create the different types of ads. Because a new mechanical didn't have to be created for each variation, it saved a lot of time and effort.

InDesign gives you the same sort of flexibility with electronic layers. You may have just two layers—one for text, the other for graphics. Or you can have a document with hundreds of different layers.

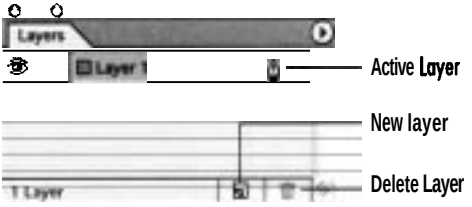
For instance, if you have English and French versions of a document, you can put the text for each language on its own layer. You can then display just one version at a time.

Creating and Deleting Layers

Every InDesign document opens with a default layer in the Layers palette. You don't have to do anything special to work with this default layer. It is instantly active and everything you do is automatically on that layer.

To open the Layers palette:

- If the Layers palette is not visible, choose Window >Layers to open it ❶.



❶ *The* Layers palette *for all new documents contains one layer.*

As you work, you may want additional layers in your document.

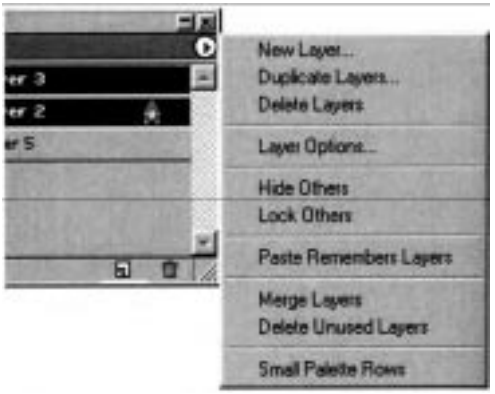
To create new layers:

1. Choose New Layer from the Layers palette menu ❷. This opens the New Layer dialog box (see page 268).

   or

   Click the New Layer icon. This creates a new layer without opening the New Layer dialog box.
2. Set the Layer Options as described in the next section.
3. Click OK to create the layer.

TIP You can open the Layer Options at any time by double clicking the name of the layer in the Layers palette or by choosing Layer Options from the Layers palette menu.

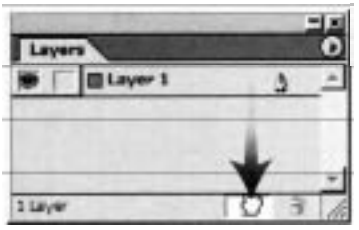


❷ *The* Layers palette menu *contains the commands for working with layers.*

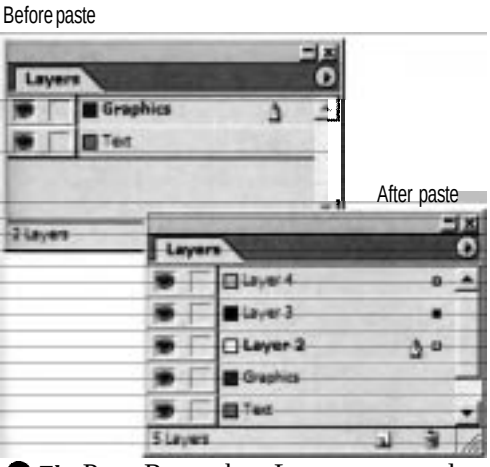
It may be easier to create different versions of a document by duplicating a layer as well as the objects on that layer.

To duplicate a layer:

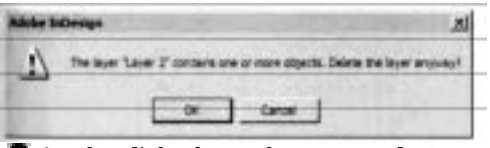
- Drag the layer onto the New Layer icon ❸. This creates a copy of the layer as well as all objects on that layer.



❸ *You can duplicate a layer by dragging it onto the* New Layer icon.



❹ *The* Paste Remembers Layers command *adds new layers when objects are pasted from one document to another.*



❺ *An alert dialog box makes sure you don't inadvertently delete artwork when you delete a layer.*

You can also import the layers automatically when you paste items from one document to another. This behavior is controlled by the Paste Remembers Layers command.

To create new layers while pasting:

1. Choose Paste Remembers Layers from the Layers palette menu. If there is a check mark next to the command, then it is already turned on.

TIP When turned on, this command is applied to all open documents.

2. Drag and drop or copy and paste the items from one document into a second document. New layers are created in the second document as follows ❹:
   - The layers from the first document are added as new layers if they do not have the same name as the layers in the second document.
   - The layers from the first document are merged with the layers if they have the same name as layers in the second document.

TIP If Paste Remembers Layers is turned off, the items are pasted onto the single active layer in the second document.

As you work, you may want to delete a layer. This deletes all objects on the layer.

To delete a layer:

1. Select the layer you want to delete.

TIP Shift-click to select multiple layers.

2. Click the Delete layer icon. If there are items on the layer an alert box appears ❺.

TIP Opt/Alt-click the Delete layer button to bypass the alert box.

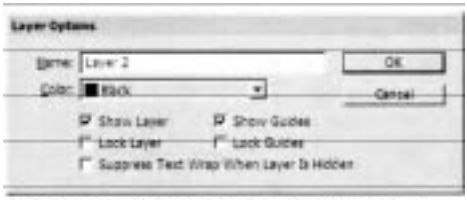
If you have layers with no objects on them, you can quickly delete those layers.

To delete all unused layers:

- Choose Delete All Unused layers from the Layers palette menu.

Setting the Layer Options

The Layer Options dialog box contains some housekeeping options that make it easier to organize and work with layers ❶. *(See the previous section for how to open the Layer Options dialog box.)*



❶ *The* **Layer Options dialog box** *is the command center for all the attributes of a layer.*

To name a layer:

- Use the Name field to name the layer.

TIP If you have many layers, you should use descriptive names instead of the default names Layer 1, Layer 2, etc.

Each layer has a color associated with it. This is the color used to highlight object frames and paths.

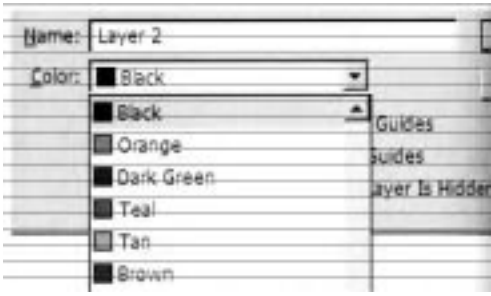
To set the highlight color for a layer:

- Choose a color from one of the thirty-seven colors in the Color list @.

TIP Each new layer is automatically assigned the next color in the Color list. This means you can have thirty-seven layers without ever repeating a color.

TIP Select Custom to choose your own color for a layer.

Layers help you organize your documents. For instance, if you lock a layer you lock **all** the objects so they cannot be selected, moved, modified, or deleted.



❷ *The* Color list *contains all the choices for highlighting objects.*

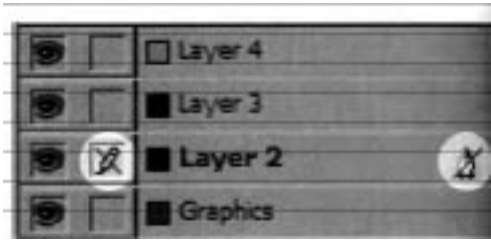
To lock a layer:

1. Choose Lock Layer from the Layer Options dialog box.

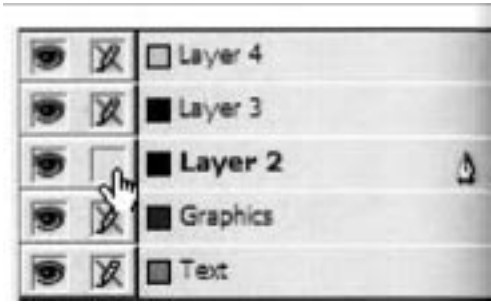
   or

   Click the Toggle Lock space in the Layers palette ❸. **A** pencil with a slash indicates that the layer is locked. **A** blank space indicates the layer is unlocked.

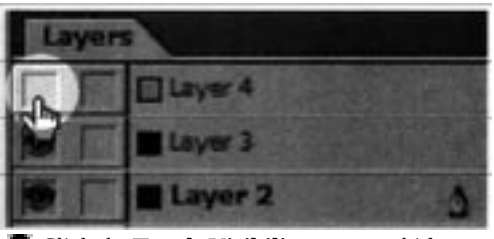
TIP Use the Lock Others command from the Layers palette menu or Opt/Alt-click the Toggle Lock space in one layer to lock all the other layers in the document ❹.



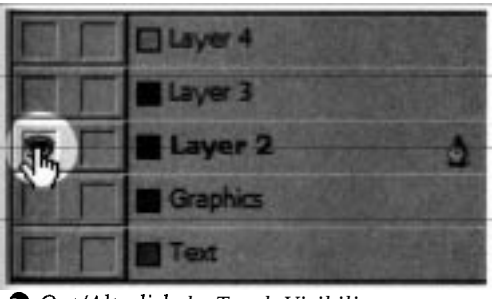
❸ *Click the* Toggle Lock **space** *to lock the layer. The spotlighted icons indicate the layer is locked.*



❹ *Opt/Alt-click the* Toggle Lock space *to lock all the other layers in the document.*



⓾ *Click the* **Toggle Visibility space** *to hide or show the layer.*



⓫ *Opt/Alt-click the Toggle Visibility space to hide all the other layers in the document.*

You can also use layers to hide and show the information on the layer. This can make it easy to focus on certain information. Hidden layers do not print.

To hide a layer:

- Deselect Show Layer from the Layer Options dialog box.

  or

  Click the Toggle Visibility space in the Layers palette so that the space is blank @. When the space is blank, the layer is invisible.

TIP You cannot work on invisible layers.

TIP Use the Hide Others command from the Layers palette menu or Opt/Alt-click the Toggle Visibility space in one layer to hide all the other layers in the document ⓫.

To show a layer:

- Select Show Layer from the Layer Options dialog box.

  or

  Click the Toggle Visibility space in the Layers palette. When the eyeball is visible, the layer is visible.

Although hidden layers don't print, you can control some of their on-screen attributes in the Layer Options dialog box such as whether the guides are visible or not, and how the text wraps on a hidden layer.

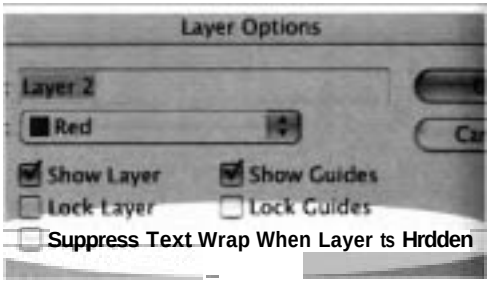
To control the guides on a layer:

1. Choose Show Guides in the Layer Options dialog box to display the guides for that layer.
2. Choose Lock Guides to protect the guides on the layer from being changed.

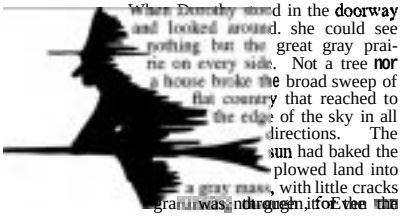
The Layer Options dialog box contains the Suppress Text Wrap When Layer Is Hidden setting that controls what happens if you turn off the visibility for a layer that has a text wrap applied to images ⓬.

To control the text wrap for hidden layers:

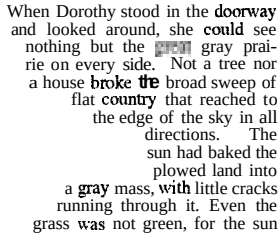
1. Apply a text wrap to an image that is on one layer.
2. Create text that is on another layer ⓭.
3. Set the Layer Options dialog box as follows:
   - Turn off Suppress Text Wrap When Layer Is Hidden to maintain the text wrap when the layer is visible ⓮.
   - Turn on Suppress Text Wrap When Layer Is Hidden to discard the text wrap when the layer is not visible ⓯.



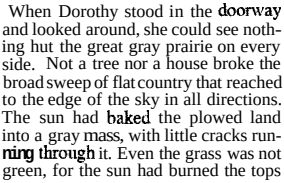
⓬ ***The*** Suppress Text Wrap When Layer Is Hidden option ***controls what happens to the text wrap for hidden layers.***



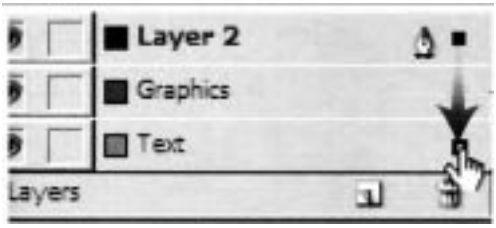
⓭ ***An image with a text wrap is placed on one layer affecting the text on another layer.***



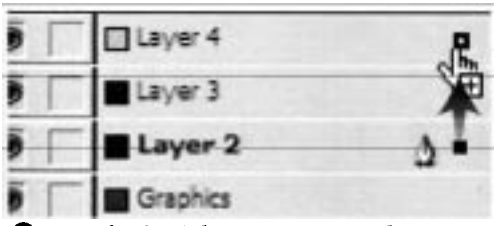
⓮ ***When the layer is hidden, the wrap continues to affect text when the*** Suppress Text Wrap option is turned off.



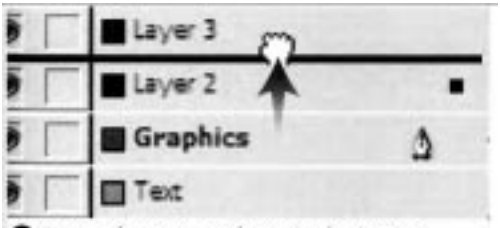
⓯ ***When the layer is hidden, the wrap does not affect text when the*** Suppress Text Wrap option is turned on.



⓰ **Drag** the **proxy** square *to move an object from one layer to another.*



⓱ *Hold the Opt/Alt key as you drag the proxy square to copy an object from one layer to another.*



⓲ *Drag a layer up or down in the Layers palette to change the order of the layers.*

Working with Layers

Once you've created additional layers in your document, you can move objects onto the new layers.

To apply objects to layers:

- Click the layer in the Layers palette so that it's highlighted, and then create the object.

Rather than cutting or copying the object, selecting the new layer, and pasting it, you can use the Layers palette to move the object between layers.

To move objects from one layer to another:

1. Select the object. A square object proxy appears next to the name of the layer in the Layers palette.
2. Drag the object proxy from one layer to another ⓰. This moves the object to a new layer.

TIP Hold the Opt/Alt key as you drag the proxy to create a copy of the object on the new layer ⓱. The original object stays on its layer.

To reorder layers:

- Drag one layer above or below another to change the order that objects appear in the document ⓲.

You may want to combine the contents of one layer with another. This is called ***merging*** layers.

To merge layers:

1. Select the layers you want to merge.
2. Choose Merge Layers from the Layers palette menu. All the objects on the layers are combined onto one layer.

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12 LIBRARIES

As you work on your layout, you may find yourself using the same objects throughout a document. For instance, if you're working on a magazine, you might want to have a series of different-sized frames to hold frequently used ads.

Rather than copying and pasting the frames from one part of the document to another, you can use a library to hold those frames—neatly labeled, sorted, and ready to use at a moment's notice.

Then, anytime you need an element, you just drag it out of the library onto your page.

InDesign gives you a wide variety of features that help you work with libraries. You can easily add items to a library as well as search and sort through the library entries.

Storing Items in a Library

Another important utility for working with long documents is the Library feature. A library allows you to store elements, such as text frames, images, or empty frames. When elements are in a library, they can be dragged easily into open documents. Libraries are especially useful when you need to use the same element many different places.

TIP Libraries appear like palettes on the screen. They float above the open InDesign documents. Libraries are available to use with any InDesign document.

To create a library:

1. Choose File>New>Library. This opens the New Library dialog box.
2. Use this dialog box to name the library file and select its location.

TIP The name of the library file appears in the tab of the Library palette.

3. Click Save. The library appears as a floating palette ❶.

To add items to a library:

1. With a library open, select the item you want to insert in it.
2. Click the Add Item button at the bottom of the Library palette.

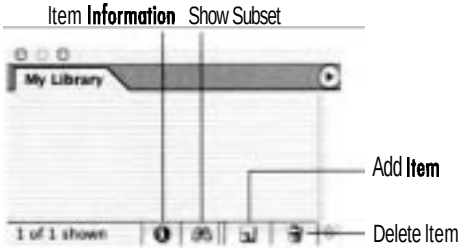
   or

   Drag the item into the library ❷. The item appears in the Library palette.

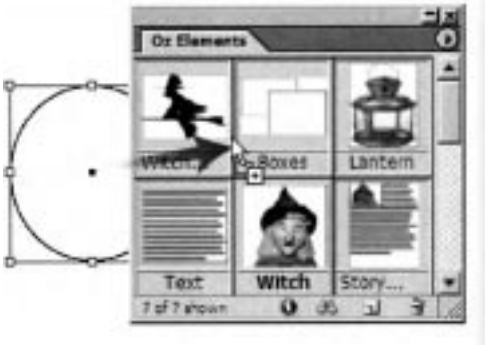
   or

   Choose Add Item from the Library palette menu ❸.

TIP Multiple items are always entered as a single library item. If you want individual items, you need to select and add them one by one.

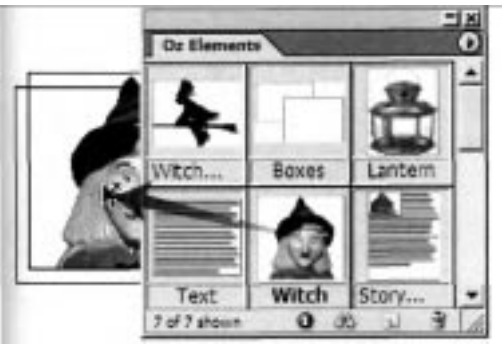


❶ *A new* Library palette *does not contain any items.*



❷ *You can add items to a library by dragging them from the page into the Librarypalette.*

❸ *The* Library palette menu *contains the commands for working with a Library.*



❹ *Items can be dragged from a library onto a document.*

You can also add all the items on a page to a library.

To add a page to a library:

1. With a library open, move to the page you want to add to the library.
2. Choose Add All Items on Page from the Library palette submenu.

TIP The Add All Items on Page command automatically labels the entry as a single page in the library Item Information dialog box (see page 276).

Strategies for Using Libraries

Libraries can be used in many different ways. I use a library to store items that I use often in a document.

For instance, I have one library labeled for this VQS book. One of the elements is a graphic frame with a text frame underneath. I drag that out for the illustrations and captions.

Other elements are the empty circles, lines, and curved arrows I use to point to elements in the figures.

Another element is a gray text frame with a stroke around it. I drag it out when I write sidebars such as this.

Libraries can be opened and the elements in the libraries dragged onto any InDesign documents.

To add library items to a document:

1. Select the item in the library.

TIP Shift-click to select multiple contiguous entries in the Library palette.

TIP Cmd/Ctrl-click to select multiple non-contiguous entries in the Library palette.

2. Drag the items from the library onto the page ❹.

   or

   Choose Place Item(s) from the Library palette menu.

To delete items from a library:

1. Select the item in the library.
2. Click the Delete Item icon.

   or

   Choose Delete Item(s) from the Library palette menu.
3. A dialog box appears asking for confirmation that you want to delete the items. Click Yes.

TIP Hold the Opt/Alt key to bypass the dialog box when you delete a library item.

Setting the Library Display

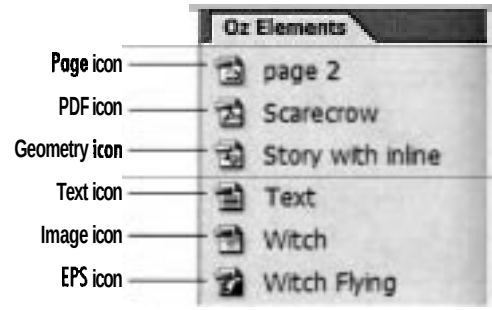
If you have many items in a library, you may want to change how the items are displayed.

To change the library display:

- Choose List View in the Library palette menu to see the item name and an icon that indicates the type of item ❺.

  or

  Choose Thumbnail View to see the name and a small preview of the item ❻.



❺ *The* List View *shows the name of the item and an icon that shows the type of item.*

❻ *The* Thumbnail View *shows the name of the item and a preview of the item.*

You can also add information such as file type and keywords that makes it easy to search for library entries.

To add to the library item information:

1. Select the item.
2. Click the Library Item Information icon.

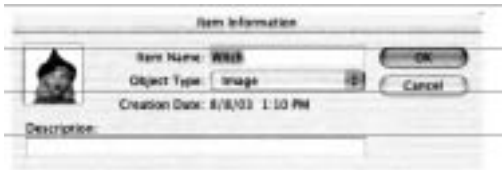
   or

   Choose Item Information from the Library palette menu. This opens the Item Information dialog box ❼.
3. Enter the name in the Item Name field.
4. Use the Object Type list to choose the following categories ❽:
   - **Image** contains raster images, such as Photoshop or TIFF files.
   - EPS contains EPS files.
   - PDF contains PDF files.
   - Geometry includes frames and rules that do not contain images or text.
   - Page is an entire page.
   - Text contains text frames.

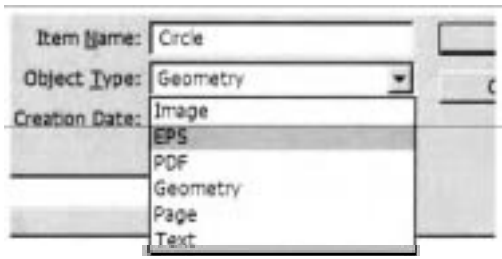
TIP **InDesign** assigns a category when items are entered into a library. You can change that listing to any category you want.

5. Enter a description for the item.

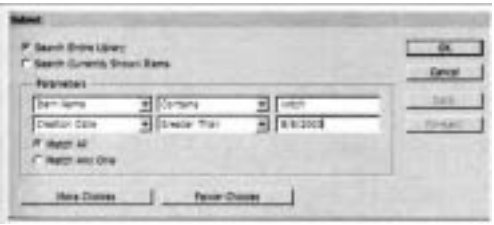
TIP The description can be keywords or other information that helps identify the item.



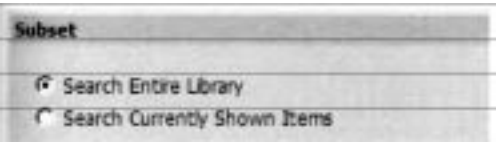
❼ *The* Item Information dialog box *lets you change the information assigned to each item.*



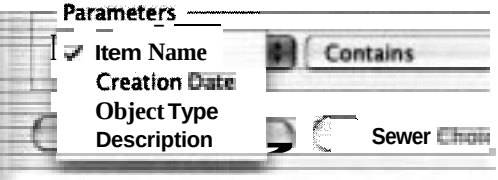
❽ *Use the* Object Type list *to apply a label for the library element.*



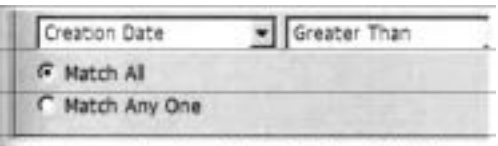
❿ *The* Subset dialog box *lets you find specific library items.*



⓫ *The* search criteria *in the Subset dialog box let you specify where to search in the Library.*



⓬ *The* Parameters menu *lets you choose what part of the Item Information is searched for.*



⓭ *The* match criteria *in the Subset dialog box control how the search items are matched.*

Searching and Sorting Libraries

If you have many items in a library, you may find it difficult to find specific library entries. InDesign has a powerful search feature that makes it easy to locate specific items in a library.

To search within a library:

1. Click the Show Library Subset icon.

   or

   Choose Show Subset from the Library palette menu. The opens the Subset dialog box ⓾.
2. Choose Search Entire Library to search **all** the entries in the library ⓫.

   or

   Choose Search Currently Shown Items to search through only those items currently displayed in the library.
3. Use the Parameters menu and fields to set the search criteria ⓬.
4. Click More Choices to add up to five choices to the parameters list.
5. Choose Match All to choose only those items that match **all** the search parameters ⓭.

   or

   Choose Match Any One to find items that meet at least one of the search parameters.
6. Click OK to display the items that meet the search criteria.

TIP Use the Back or Forward buttons to move to previous search settings in the Subset dialog box.

To display all the library entries:

- Choose Show All from the Library palette submenu.

To sort library entries:

- Choose the Sort Items options from the Library palette menu:
  - **By** Name arranges the items in alphabetical order.
  - By Oldest arranges the items in the order they were added with the oldest items first.
  - **By** Newest arranges the items in the order they were added, with the newest items first.
  - **By Type** arranges the items in groups according to their categories (see page 276).

TABS AND TABLES 13

Before tabs and tables, there was chaos. Well, perhaps not chaos, but it was difficult to line columns of text in an orderly fashion.

The word "tab" comes from the tabulator key on a typewriter. (Does anyone still use a typewriter?) The tabulator key moved the carriage return a certain number of spaces.

The tabulator key was named because it allowed typists to create tabular data. Tabular data is information arranged in systematic rows and columns—otherwise known as a table.

However, mathematical information isn't the only thing arranged in tables. Resumes, menus, train schedules, calendars, and even classified ads are all arranged in some form of table.

Anytime you need to keep text or graphics aligned in either columns or rows, consider using the tabs and tables features in InDesign.

Not only can you align text using tabs, but you can create tab leaders that make it easy to read across the lines of text. You can also create tables with repeating headers and footers and add custom strokes and fills to the tables.

Inserting Tab Characters

There are two parts to working with tabs. The first part is to insert the ***tab characters*** that force the text to jump to a certain position.

To insert tab characters into text:

1. Position the insertion point where you want the tab character to be located.
2. Press the tab key on the keyboard. This creates a tab character in the text ❶.

TIP Choose **Type** >Show Hidden Characters to see the display of the tab character within the text ***(seepage*** 66**)**.

TIP InDesign recognizes tab characters in imported text.

InDesign also has a special type of tab character called a right tab. This tab character automatically sets the text to the right-most position in the frame ❷.

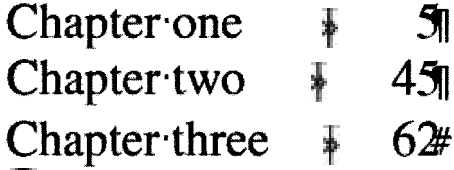
To insert a right tab character:

1. Place the insertion point where you want the right tab character.
2. Press Shift+Tab.

   or

   Use the Contextual menu to insert a right tab character from the Insert Special Character menu.

❶ **A tab character** ***is displayed as part of the hidden characters in text.***



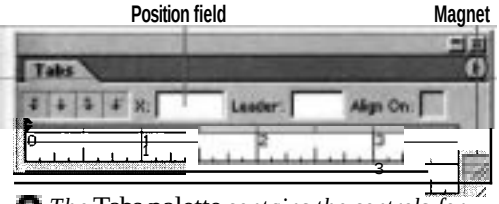
❷ ***The*** **right tab character** ***automatically moves the text to the right side of the text frame.***

Inserting Tabs in Text

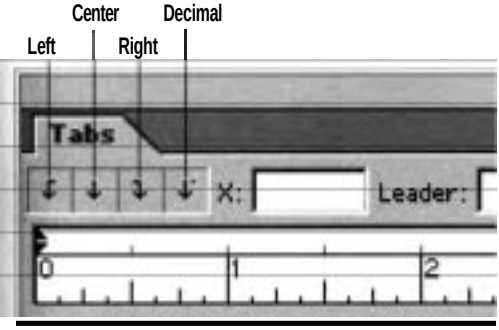
It's actually very simple to insert a tab character into text. Just tap the Tab key. However, there are some guides for working with tabs.

Insert only one tab character for each column. Even if the text doesn't line up correctly, don't add another tab key. Use the Tab palette and tab stops to line up the columns.

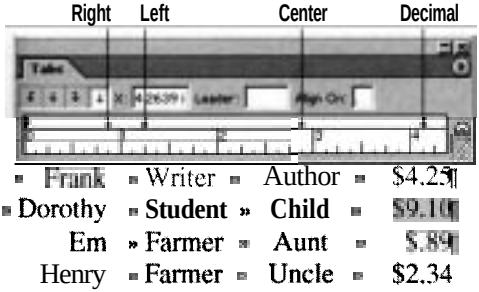
If you're above a certain age, you may have been taught to put a tab at the beginning of a paragraph to indent the first line. Don't do it! As mentioned in Chapter 3, you can use the first line indent to format paragraphs.



❸ *The* Tabs palette *contains the controls for inserting tab stops and aligning the tabs.*



❹ *Choose one of the four* tab alignment icons *to control how the text is aligned.*



❺ *Examples of how the four tab alignments control the text.*

Setting Tab Stops

The next—and most important—part to working with tabs is to set the *tab stops* or the formatting controls that set where the text should stop after it is forced to jump to a new position. This alignment is controlled using the Tabs palette.

To open the Tabs palette:

- Choose Type >Tabs. The Tabs palette appears above the text frame ❸.

TIP The Tabs palette can be kept onscreen like any other palette.

TIP If the Tabs palette is not positioned above the text, click the Magnet icon in the palette to automatically move the palette to the correct position.

To set tab stops:

1. Select the text.
2. Choose the type of tab alignment from the four tab icons in the ruler ❹. The four alignments work as follows ❺:
   - **Left** aligns the left side of the text at the tab stop.
   - Center centers the text on either side of the tab stop.
   - Right aligns the right side of the text at the tab stop.
   - Decimal aligns the text at the decimal point or period of the text.
3. Click the ruler area where you want the tab stop to be positioned.

   or

   Type a number in the Position field. A small tab arrow corresponding to the tab type appears that indicates the position of the tab stop.

TIP The default tab stops are invisible left-aligned tabs positioned every half inch. Adding tab stops to the ruler overrides all tab stops to the left of the new tab.

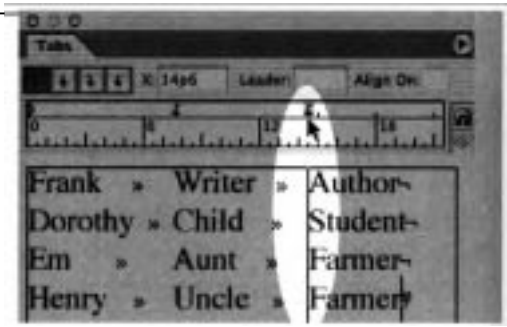
To change tab settings:

1. Select the text.
2. Open the Tabs palette.
3. To change the alignment of a tab stop, select the tab arrow and then click a new alignment icon.

   or

   Hold the Opt/Alt key and click the tab arrow in the ruler.
4. To change the position of a tab stop, drag the tab arrow to a new position.

TIP As you move a tab stop along the ruler, a line extends through the text, even if the Tabs palette is not aligned to the text frame ❻. This helps you judge the position of the tab stop.



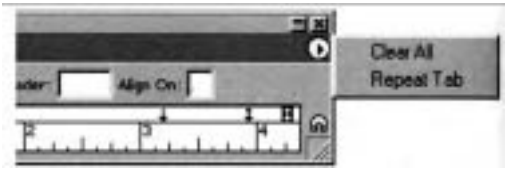
❻ *As you move a tab stop, a* line extends through the text *to help you position the tab stop correctly.*

Many times you will want to have tab stops repeated at the same interval. InDesign makes it easy to set repeating tabs.

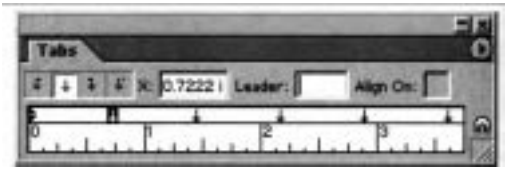
To set a repeating tab:

1. Position the first tab stop on the ruler.
2. With the tab stop still selected, choose Repeat Tab from the Tabs palette menu ❼. This adds new tab stops at the same interval along the ruler ❽.

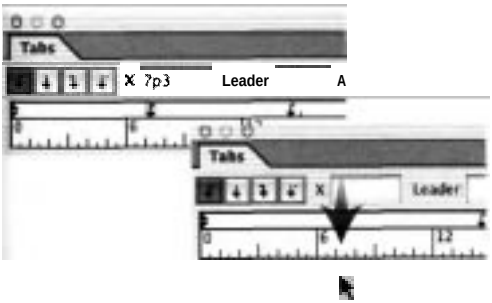
TIP The tab stops created by the Repeat Tab command are not linked and move independently.



❼ *The* Tabs palette menu *gives you two important commands for working with tabs.*



❽ *The* Repeat Tab command *allows you to easily add tab stops at the same interval along the ruler.*



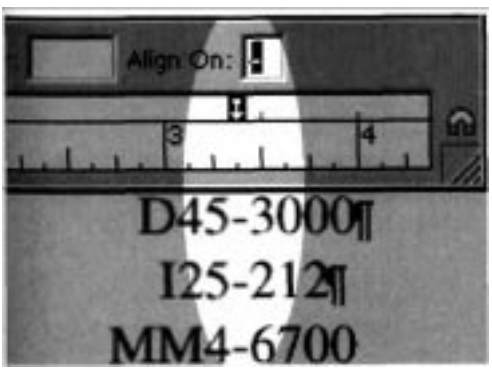
❾ *To remove a tab stop, drag it off the Tabs palette ruler.*

Once you have added tab stops to the Tabs palette ruler, you can remove them easily.

To remove tab stops:

1. Select the tab stop on the Tabs palette ruler.
2. Drag the tab stop off the ruler. This deletes the tab stop ❾.

TIP If there are no tab stops to the left of the one you removed, this restores the invisible, default tab stops at the nearest half-inch position.



❿ ***You** can enter a custom alignment character for the* **Align *On* field.** *Here the text aligns to the hyphen.*

If you have many tab stops on the Tabs palette ruler, it may be easier to delete **all** the tab stops with a single command.

To clear *all* the tabs off the ruler:

- Choose Clear *All* from the Tabs palette ruler ❼. This restores the invisible, default tab stops at every half-inch mark.

The Decimal tab aligns numerical data to a decimal point. However, you may need to align text to a different character. For instance, some European currency uses a comma instead of a decimal. InDesign lets you set a custom alignment character.

To set a custom alignment character:

1. Choose the Decimal Tab icon.
2. Add a tab stop to the ruler.
3. Replace the period in the Align On field with a different character. The text aligns around that character ❿.

Creating Tab Leaders

A ***tab leader*** allows you to automatically fill the space between the tabbed material with a repeating character. Tab leaders are often used in the tables of contents of books ***(such as the table of contents in this book).***

TIP Tab leaders are added when the reader needs to move along a wide column from one entry to another. The tab leader helps the reader's eye stay on the correct line of text.

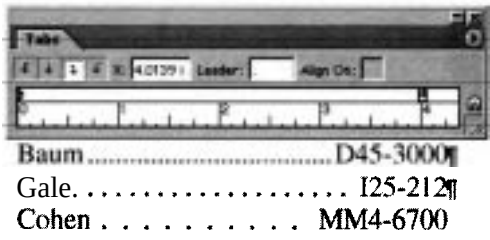
To add tab leaders:

1. Select the tab stop arrow on the Tabs palette ruler.
2. Type up to eight characters in the Leader field of the Tabs palette.

TIP Add spaces between characters in the Leader field for a more pleasing look for the leader ⓫.

TIP Press the tab key on the keyboard to preview the characters in the Leader field.

TIP You can select the characters in a tab leader like ordinary text and change the point size, kerning, or other attributes.



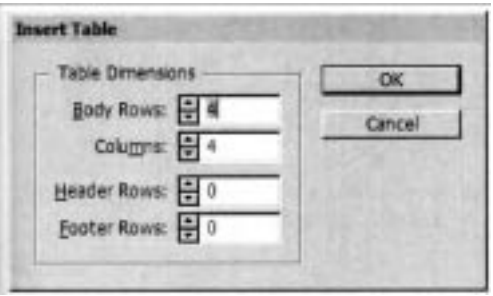
⓫ ***An example of adding spaces to separate the tab leader.***

Choosing Between Tabs and Tables

For as long as I can remember, designers have wanted an easy way to create tables in page-layout documents. Now that InDesign lets you create tables, is there any reason to still use tabs?

Absolutely! I use tabs in this book to separate numbers from the text in the exercises. I also use tabs with leaders for the listings in the table of contents.

I use tables whenever I need side-by-side paragraphs such as in a resume. I also use tables whenever I need to separate the information with horizontal and vertical lines.



⓬ *Use the* Insert Table dialog box *to create an empty table in a text frame.*

Creating and Using Tables

Tabs limit you to lining up only a single line of text. Tables let you line up text so it can extend down into several lines. Tables also let you add borders to the cell that contains the text or add fills of color behind the text.

To create a new table in a text frame:

1. Place an insertion point inside a text frame.
2. Choose Table>Insert Table. The Insert Table dialog box appears ⓬.
3. Use the Body Rows control to set the number of rows down in the table.
4. Use the Columns control to set the number of columns.
5. Use the Header Rows control to set the number of rows across the top of the table.
6. Use the Footer Rows control to set the number of rowsacross the bottom of the table.

TIP Headers and footers are special cells that are repeated when the table is divided between frame or pages. ***(See page 300 for more information on working with headers and footers in tables.)***

7. Click OK. InDesign creates a table that fills the text frame as follows:
   - The width of the table is set to fill the width of the text frame.
   - The table columns are distributed evenly across the table.
   - The height of the table is set at the size of the default text sue plus 8 points to accomodate the cell inset ***(see page 304)***.
   - If the default height of the table is greater than the sue of the text frame, an overflow symbol appears indicating that the table can flow to another frame ***(see page 49)***.

Many times you will import text that you'd like to be converted into a table. Fortunately, this is rather easy to do.

To convert text into a table:

1. Select the text.
2. Choose Table > **Convert** Text to Table. The Convert Text to Table dialog box appears ⓭.
3. Use the Column Separator menu to choose which character should be used as the marker for each column in the table.

   or

   Type the character that you would like as the marker in the Column Separator field.

TIP If you have imported tabbed deliminited text, this is most likely a tab character although paragraph returns and spaces are sometimes used.

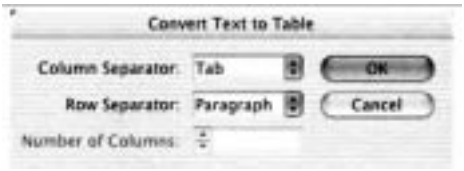
4. Use the Row Separator menu to choose which character should be used as the marker for each row in the table.

   or

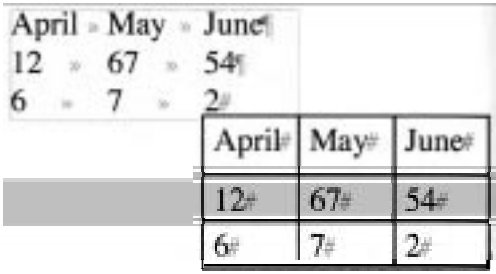
   Type the character that you would like as the marker in the Row Separator field.

TIP For most text, this is the paragraph symbol.

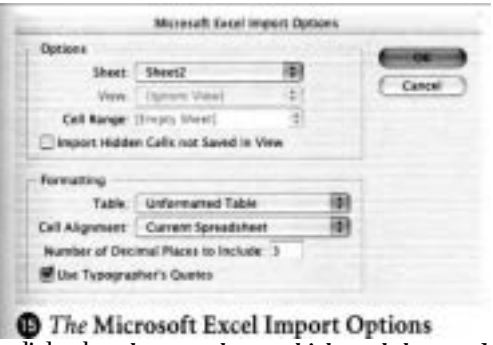
5. If you have chosen anything except a paragraph symbol for the Row Separator, use the Number of Columns field to choose how many columns there should be in the table.
6. Click **OK** to create the table ⓮.



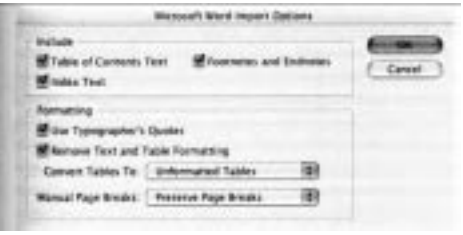
⓭ ***The*** Convert Text to Table dialog box ***lets you choose how text is converted to a table.***



⓮ ***The*** Convert Text to Table command ***transforms tabs and paragraphs into rows and columns.***



15 *The* **Microsoft Excel Import Options** dialog box ***lets you choose which worksheet and cells are imported from an Excel document.***



16 ***The*** Microsoft Word Import Options dialog box ***lets you choose how Word tables are imported into the InDesign document.***

Most people use Microsoft Word and Excel to create text and spreadsheets. InDesign lets you import the tables created by both Word and Excel.

To import a table from Word or Excel:

1. Place an insertion point inside a frame.

   or

   Deselect any text frame. This creates a loaded text cursor.
2. Choose **File** >Place and navigate to the Word or Excel file.
3. If necessary, use the Microsoft Excel Import Options **15** or the Microsoft Word Import Options **16** to control how the file will be imported, as described on the next two pages, Click OK.
4. The imported document is inserted into the selected text frame.

   or

   Click or drag the loaded text cursor.

When you import from Excel, InDesign automatically chooses all the cells in the worksheet that contain data. However, you can customize which cell data is imported.

To choose the cells that should be imported:

1. Use the Sheet menu to choose which worksheet should be imported.
2. If you have specified a custom view in Excel, use the View menu to choose that view.
3. Use the Cell Range field to specify a set of cells.
4. If desired, check the Import Hidden Cells not Saved in View box.

To set the formatting for Excel cells:

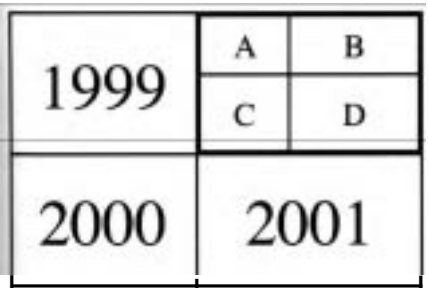
1. Use the Table list to change the formatting options as follows:
   - Formatted Table imports the cells with whatever formatting was applied in Excel.
   - Unformatted Table imports the cells with no formatting except a stroke around each InDesign cell.
   - Unformatted Tabbed Text converts the cells into text divided by tab characters.
2. Choose the options in the Cell Alignment menu as follows:
   - Current Spreadsheet imports the text aligned with whatever alignment was set in the spreadsheet.
   - **Left** imports the text aligned to the left side of each cell.
   - Center imports the text aligned to the center of each cell.
   - **Right** imports the text aligned to the right side of each cell.
3. Use Number of Decimal Places to Include to set how many decimal places to include in the imported cells.
4. If desired, check Use Typographer's Quotes to convert straight "quotes" (like these) into open and closed "quotes" (like these).

Importing from Spreadsheets

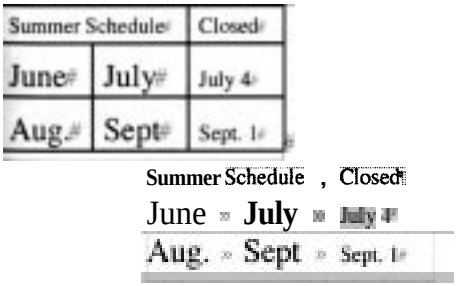
Most likely, if you need to import data from Excel spreadsheets, the files have been created by accountants or others who know little about graphic design or page layout.

Try to talk to them before they send you the file for layout. Explain that they should not format their document using the controls in Microsoft Excel. Most of the time you will just have to strip out that formatting in order to make the file work in your layout.

You may also want to ask them for a test file so you can see how the information will be imported.



⓱ *An example of how a table can be inserted inside a cell of another table.*



⓰ *The* Convert Table to Text command *transforms table rows and columns into tabs and paragraph returns.*

You can also control how table information in Word documents is imported.

To set the formatting for Word tables:

1. Select Remove Text and Table Formatting in the Microsoft Word Import Options dialog box to change the original formatting applied in Word.

TIP Use this option to remove some of the hideous formatting that may have been applied to Word tables.

2. If you have set the option to remove the formatting, choose one of the following from the Convert Tables to menu:
   - Unformatted Tables imports the Word table with no formatting except a stroke around each cell.
   - Unformatted Tabbed Text converts the cells into text divided by tab characters.

You can insert a table inside the cell of another table. This lets you use a table as the grid structure for a page and then insert smaller tables within the cells. For instance, a calendar might be laid out as an entire page with smaller tables within the cells.

To place a table in a table cell:

1. Click with the Text tool to place an insertion point inside a table cell.
2. Use the Insert Table command or a Place command to create a table within that cell ⓱.

To convert a table to text:

1. Place an insertion point in any cell inside the table.
2. Choose Table>Convert Table to Text. This converts the table as follows ⓰:
   - Table columns are converted to tab characters.
   - Table rows are converted to paragraph returns.

Navigating Through Tables

As you work with tables, you will want to add content to the cells, move from cell to cell, and select cells, rows, and columns.

To insert text into table cells:

1. Place an insertion point inside a table cell.
2. Type the text for the cell.

   or

   Choose File > Place to insert imported text in the cell.

TIP Press Opt/Alt-Tab to insert a tab character inside a cell.

To move from one cell to another:

- Press the Tab key to jump forward from one cell to another ⑲.

  or

  Press Shift-Tab to move backwards from one cell to another ⑳.

Since you navigate through a table using the Tab character, you need some special techniques to insert actual tab characters into a table.

To insert a tab character into a table:

- Press Opt/Alt-Tab to insert a tab character inside a cell ㉑.

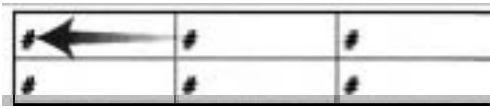
  or

  Choose Type > Insert Special Character > Tab Character.

To jump to a specific row:

1. Choose Table > Go to Row. The Go to Row dialog box appears ㉒.
2. Use the menu to move to the body, header, or footer of the table.
3. Enter the number for the row you want to move to.

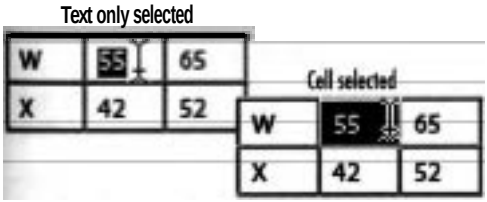
⑲ ***Press the Tab key to*** **jump** forward from one cell to another ***in a table.***



⑳ ***Press Shift-Tab to*** **jump** backward from one cell to another in ***a table.***

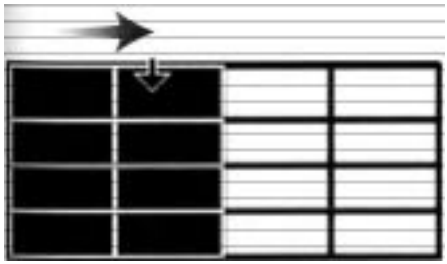
㉑ ***Press*** *Opt/Alt-Tab* ***to*** insert a tab character ***into a table.***

㉒ ***The*** Go to Row dialog box ***lets you quickly jump from one row to another.***



When the text in a cell is selected, only the text is highlighted. When the entire cell is selected, the entire cell area is highlighted.

Drag across and then down to select a specific group of cells in a table.



The down arrow cursor *indicates you can click to select an entire column in a table.*

Selecting Tables

By clicking and dragging your cursor, you can select cells, columns, row, or the entire table.

TIP When the entire cell, rows, columns, or combination of cells are selected, you can copy and paste cells from one part of a table to another *(see page **294**).*

To select text in a table cell:

1. Place an insertion point inside a table cell.
2. Drag across the cell until all the text in the cell is highlighted.

   or

   Choose **Edit > Select *All*** to select all the text within that cell.

TIP There is a difference in the appearance between just the text selected or the entire cell selected@.

To select text in multiple table cells:

1. Use the Text tool to drag across to select the cells in specific columns .
2. If you want, continue to drag down to select the cells in additional rows.

To select a table column:

1. Place the Text tool cursor at the top of the table. **A** down arrow cursor appears.
2. Click the down arrow. The entire column is selected .
3. Drag across with the down arrow cursor to select any additional columns.

   or

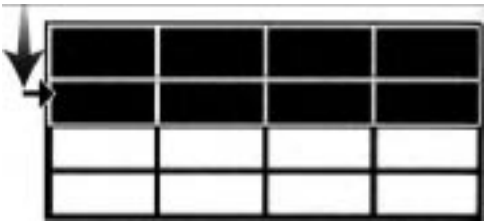
   Move the down arrow to another column and Shift-click to select multiple columns.

To select a table row:

1. Place the Text tool cursor at the left side of the table. **A** left arrow cursor appears.
2. Click the left arrow. The entire row is selected 26.
3. Drag down with the left arrow cursor to select any additional rows.

   or

   Move the down arrow to another row and Shift-click to select multiple rows.



26 ***The*** left arrow cursor ***indicates you can click to select an entire row in a table.***

To select the entire table:

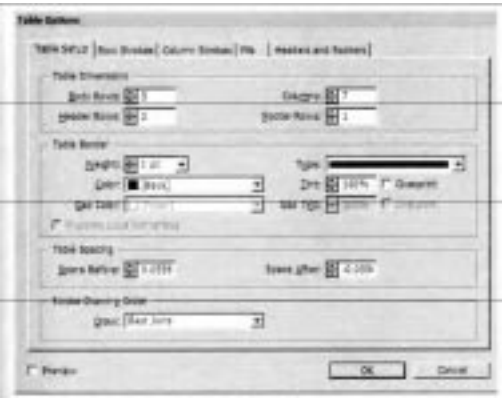
1. Place the Text tool cursor at the top corner of the table. **A** slanted arrow cursor appears.
2. Click the slanted arrow. The entire table is selected 27.

27 ***The*** Go to Row menu ***lets you specify the body, header, or footer of a table.***

To use the table selection commands:

1. Place the insertion point in a cell in the table.
2. Choose one of the following commands:
   - Table >Select >Cell selects the cell.
   - Table >Select >Row selects the row that contains the cell.
   - Table >Select >Column selects the column that contains the cell.
   - Table >Select >Table selects the entire table.

TIP The table selection commands are very helpful for applying borders and fills to table cells (see page 306).



28 ***The*** Table Setup dialog box ***contains the basic options for a table's appearance.***

29 ***The*** Table Dimensions area ***lets you set the number of rows, columns, header rows, and footer rows.***

Working with Rows and Columns

Once you've created a table, you may want to change the number of rows and columns in the table.

TIP In addition to the Table menu and dialog boxes, many adjustments to tables can be made using the Table palette or Control palette. (See the section ***Using the Table or Control palettes*** at the end of this chapter for more information on modifying tables with those onscreen elements.)

To change the number of rows and columns:

1. Select the entire table or any part of the table.
2. Choose **Table** >**Table** Options >**Table** Setup to open the Table Setup dialog box **28**.
3. Set the Body Rows controls in the Table Dimensions area to increase or decrease the number of rows in the main section of the table **25**.
4. Set the Header Rows controls to increase or decrease the number of rows in the header section of the table **27**. ***(See page 300 for more information on working with headers and footers.)***
5. Set the Columns controls to increase or decrease the number of columns in the table **29**.
6. Set the Footer Rows controls to increase or decrease the number of rows in the footer section of the table **26**.

TIP Use the Preview control at the bottom of the Table Setup dialog box to see the results of changing the controls.

TIP The commands in the Table Dimensions section always add rows and columns at the end of the table sections. The next exercise explains how to insert rows and columns into a specific location in the table.

You can also insert columns and rows into a specific location in a table.

To insert columns into a table:

1. Place an insertion point where you want to insert the columns.
2. Choose Table >Insert >Column. The Insert **Columns(s)** dialog box appears 30.

   or

   Choose Insert >Column from the Table palette menu.
3. Use the Number field to set the number of rows.
4. Choose either Left or Right to specify where the new rows should be inserted 31.

To insert rows into a table:

1. Place an insertion point where you want to insert the rows.
2. Choose Table >Insert >Row. The Insert **Row(s)** dialog box appears 32.

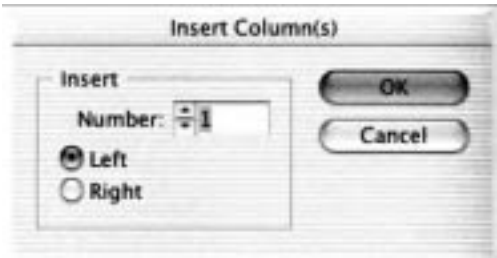
   or

   Choose Insert **>Row** from the Table palette menu.
3. Use the Number field to set the number of rows.
4. Choose either Above or Below to specify where the new rows should be inserted.

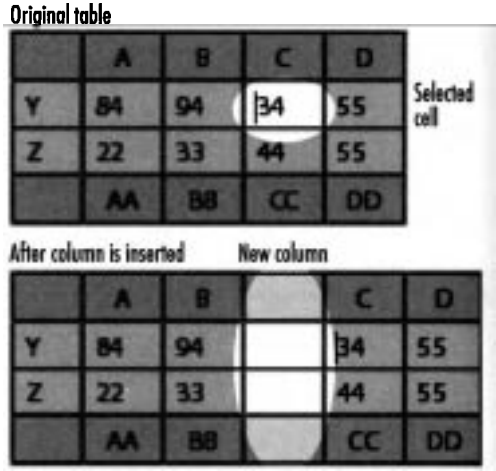
TIP The Insert **Row(s)** dialog box inserts rows into the header, footer, or main section of a table.

To insert rows as you type:

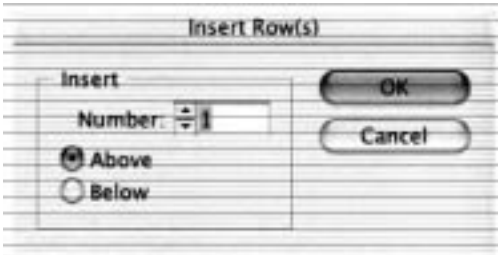
1. Place the insertion point in the final cell of the last row of the table main body, header or footer.
2. Press the Tab key. A new row is automatically inserted.



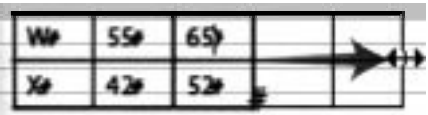
30 *Use the* Insert **Column(s)** dialog box *to add columns at a specific location within a table.*



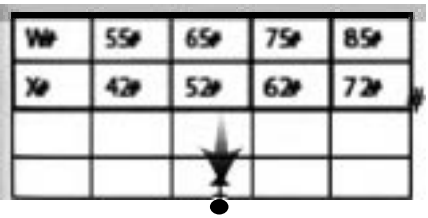
31 *An example of how a column is added to the left of the selected cell.*



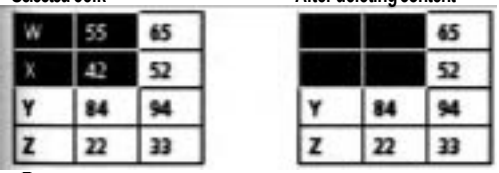
32 *Use the* Insert **Row(s)** dialog box *to add rows at a specific location within a table.*



33 ***Hold the Opt/Alt key as you drag across to*** add columns ***to a table.***



34 ***Hold the Opt/Alt key as you drag down to*** add rows ***to a table.***



35 ***An example of how you can*** delete the content of selected cells.

To add columns as you drag the table edge:

1. Drag the last column of the table.
2. Press the Opt/Alt key as you drag. This expands the size of the table by adding columns **33**.

To add rows as you drag the table edge:

1. Drag the last row of the table.
2. Press the Opt/Alt key as you drag. This expands the size of the table by adding rows **34**.

To delete table columns:

1. Select the columns you want to delete.
2. Choose Table>Delete>Column.

To delete table rows:

1. Select the rows you want to delete.
2. Choose Table>Delete>Row.

To delete the entire table:

1. Select the table.
2. Choose Table>**Delete>Table.**

You may want to delete the content inside a cell without deleted the cell itself.

To delete the content in table cells:

1. Select the cells, columns, or rows.
2. Press the Delete/Backspace key or choose Edit>Clear.

TIP The content is deleted but the cells themselves remain in place **35**.

You can't move cells from one place to another, but you can copy and paste cells and their content to new locations.

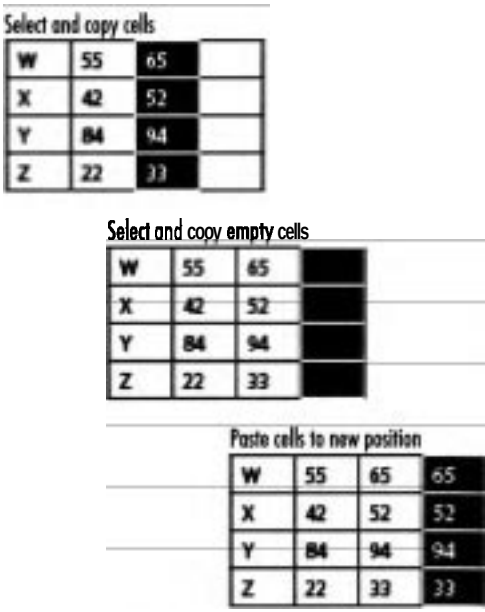
To copy and paste the content in table cells:

1. Select the cells, columns, or rows that you want to move to a new position.
2. Choose Edit >**Copy** or Edit >Cut. This puts the selected cells on the clipboard.
3. Select the new cells, columns, or rows.

TIP You should select at least the same number of cells, columns, or rows, that were selected in step 1.

4. Choose Edit>Paste. The content on the clipboard is pasted into the selected cells (36).

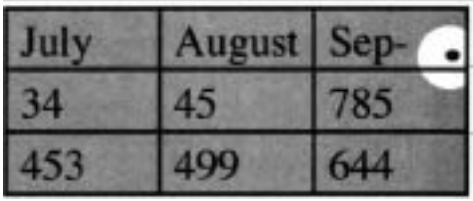
TIP If you selected more cells than were selected in step 1, the excess cells are not changed.



(35) ***The three-step process to*** copy and move cells ***from one position to another.***

When you create a table, **all** the columns and rows are evenly spaced. However, you can modify the size of the rows and columns.

TIP **A** red dot inside a table cell indicates there is an overflow of text (37). You can change the size of the cell to display the overflow text.



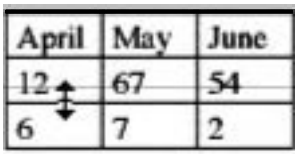
(37) A red dot inside a table cell ***indicates that there is an overflow of text inside the cell.***

To change a single row height visually:

1. With the Text tool selected, place the cursor along the border of the row you want to adjust. The cursor changes to an up/down arrow (38).
2. Drag to adjust the height of the row.

To change all the rows visually:

1. Place the cursor along the bottom border of the table. The cursor changes to an up/down arrow.
2. Hold the Shift key as you drag to adjust the height of **all** the rows in the table.

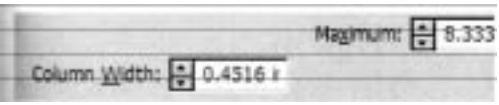


(38) ***The*** Up/Down arrow ***indicates you can adjust the row height.***

40 ***The*** Rows and Columns category ***of the Cell Options dialog box.***

April	May	June
12	67	54
6	7	2

42 ***The*** **Left/** Right arrow ***indicates you can adjust the column width.***



41 ***The*** Column Width control ***of the Cell Options dialog box.***

To set the row height numerically:

1. Select the rows you want to adjust.
2. Choose Table **>Cell** Options >Rows and Columns to open the Cell Options dialog box to the Rows and Columns options **40**.
3. Set the Row Height menu as follows:
   - At Least sets a row height that can increase to hold text or an image.
   - Exactly sets a row height that does not get larger.
4. Enter an amount in the Row Height field.
5. Use the Maximum field to prevent the row from becoming too tall.

TIP **A** red dot in the cell indicates an overflow of text that cannot fit inside the cell.

To change the column width visually:

1. With the Text tool selected, place the cursor along the border of the column you want to adjust. The cursor changes to a left/right arrow **42**.
2. Drag to adjust the width of the column.

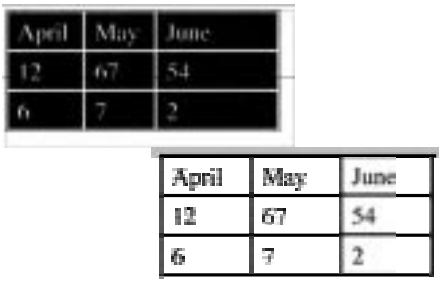
To set the column width numerically:

1. Select the columns you want to adjust.
2. Enter an amount in the Column Width field **41**.

You can adjust columns or rows so their spacing is evenly distributed.

To automatically distribute columns:

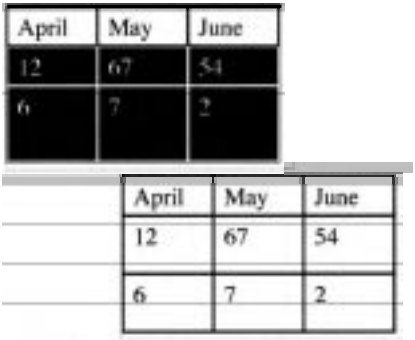
1. Set the right-most column to the position it should be after the adjustment.
2. Select the columns you want to adjust.
3. Choose Table >Distribute Columns Evenly. The column widths adjust 42.



42 ***The results of using the*** Distribute Columns Evenly ***command.***

To automatically distribute rows:

1. Set the bottom-most column to the position it should be after the adjustment.
2. Select the rows you want to adjust.
3. Choose Table >Distribute Rows Evenly. The row heights adjust so they are the same size 43.

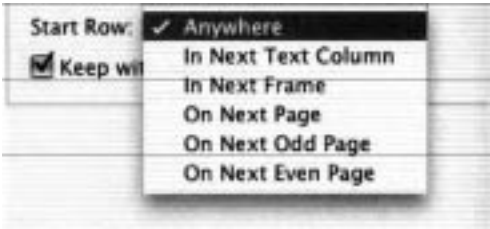


43 ***The results of using the*** Distribute Rows Evenly ***command.***

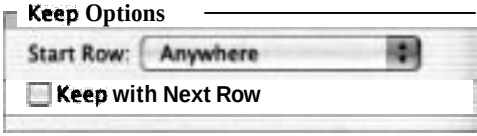
If you want, you can control when and how the rows of a table break across text frames. This is called the ***keep options*** for rows.

To set the keep options for rows:

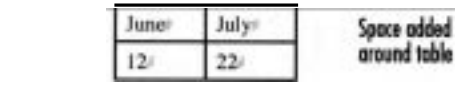
1. Select the rows you want to control.
2. Choose Table >**Cell** Options >Rows and Columns.
3. Choose from the Start Row list as follows 44:
   - Anywhere lets the row start anywhere in a text frame.
   - In Next Text Column forces the row to the next column in the frame or the next text frame.
   - In Next Frame forces the row to the next text frame.
   - On Next Page forces the row to the next page.
   - On Next Odd Page forces the row to the next odd-numbered page.
   - On Next Even Page forces the row to the next even-numbered page.
4. Check Keep **with** Next Row to make sure one row doesn't separate from another 45.



44 ***The*** Start Row menu ***lets you choose where that row starts.***

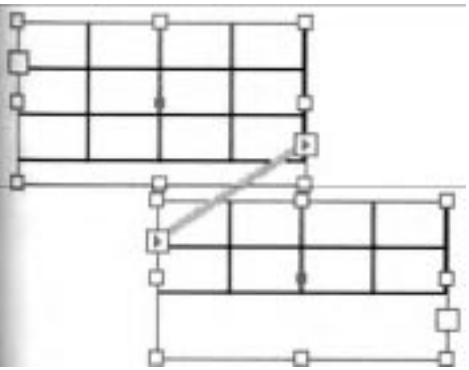


45 ***Check*** Keep with Next Row ***to force one row to always stay with the next one.***



Add some space around a table to keep it from colliding with text.

47 *The* **Table Spacing controls** *let you set the amount of space before and after a table.*



48 *The text threads show how tables can flow from one frame to another.*

Adjusting Tables Within a Text Frame

Tables are always contained within text frames. You can control how much space there is between the table and the text that precedes or follows it 46.

To set the spacing around a table:

1. With the table selected, choose Table >Table Options >Table Setup. The Table Options dialog box appears.
2. Use the Table Spacing control for Space Before to set the amount of space between text and the top of the table 47.
3. Use the Table Spacing control for Space After to set the amount of space between the bottom of the table and the text that follows it.

TIP A table is inserted into a text frame as an inline object on its own paragraph. This means that any space before or after the paragraph that holds the table is added to the space set by the Table Spacing controls.

If a table extends longer than a text frame, you get a text frame overflow. You can easily flow the rest of the table from frame to frame across pages.

To flow tables between frames:

1. Use the Selection tool to load the overflow cursor.
2. Click the overflow cursor inside the new frame to flow the rest of the table into the frame 48.

Working with Headers and Footers

Tables with lots of data often flow from one location to another. For easy navigation, you can repeat the first and last rows of the table each time it appears in a new place. When the first row of a table repeats, it is called a *header*. When the last row repeats, it is called a *footer*. You can create headers and footers when you first define a table *(see page 285)* or add or modify them in an existing table.

To add a header or footer to a table:

1. With the table selected, choose Table > Table Options > Headers and Footers. The Table Options dialog box opens to the Headers and Footers tab (49).
2. Use the Header Rows controls to set the number of repeating rows added to the top of the table (50).
3. Use the Footer Rows controls to set the number of repeating rows added to the bottom of the table.

TIP To turn off a header or footer, set the Header Rows or Footer Rows to zero.

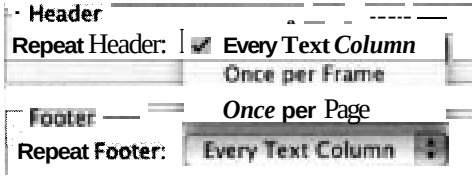
TIP You can also set the number of header and footer rows in the Table Setup.

To set the repeat options for headers and footers:

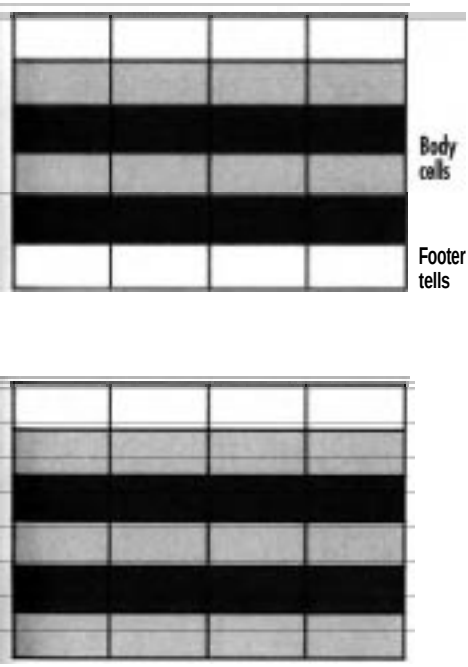
1. Use the Repeat Header or Repeat Footer menu as follows (51):
   - Every Text Column repeats the header or footer whenever the table appears.
   - Once per Frame repeats the header or footer only once in the same frame. This is useful when a table flows from one column to another.
   - Once per Page repeats the header or footer only once in the same page. This is useful when a table flows into multiple frames on the same page.
2. Check Skip First to display the header or footer only after the first instance of the table.

(49) *The* Headers and Footers area *in Table Options lets you control the appearance of headers and footers in the table.*

(50) *Use the* Table Dimensions for Headers and Footers *to control the number of header and footer rows.*



(51) *Use the* Repeat Header menu *to set how frequently the header appears.*



An example of what happens when a row is converted from body cells to header cells. Notice that the footer takes on the alternating fill.

As you work, you may want to convert body table cells into a header or footer.

To convert cells into a table header:

1. Select the rows that you want to convert. These rows must be the first rows of the table.
2. Choose Table >Convert Rows >To Header. The rows are converted from the body of the table to the table header.

TIP If there already is a header for the table, the cells are added to the bottom of the existing cells.

To convert cells into a table footer:

1. Select the rows that you want to convert. These rows must be the last rows of the table.
2. Choose Table >Convert Rows >To Footer. The rows are converted from the body of the table to the table footer.

TIP If there already is a footer for the table, the cells are added to the top of the existing cells.

Finally, you may want to convert the rows in a header or footer into the body of the table.

To convert header or footer cells into body cells:

1. Select the rows that you want to convert.

TIP The rows must be the bottom rows of the header or the top rows of the footer.

2. Choose Table >Convert Rows >To Body.

Adding Images to Tables

Although table cells are created to hold text, you can easily add images as inline graphics to each cell. *(See page 196 for more information on working with inline graphics.)*

To insert a graphic into a table cell:

1. Place an insertion point inside a table cell.
2. Choose File >Place to insert an image into the cell (53).

   or

   Paste a graphic copied to the clipboard into the cell.

TIP Graphics in cells are pasted as inline graphics.

(53) *An example of how a placed image can be inserted into a table cell.*

If the graphic is larger than the size of the cell, some of the graphic may stick out beyond the cell. You use the Clipping setting to control if placed graphics are seen outside a cell.

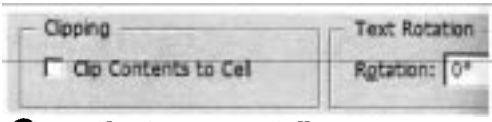
To control the display of a graphic inside a cell:

1. Place your insertion point inside the cell that contains the placed graphic.
2. Choose Table >**Cell Options** >Text. This opens the Cell Options dialog box (54).
3. Select Clip Contents to Cell to limit the display of the graphic to inside the cell (55).

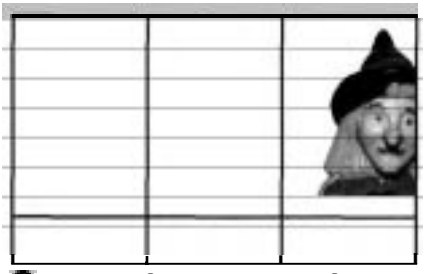
   or

   Deselect Clip Contents to Cell to allow the graphic to be displayed outside the cell (56).

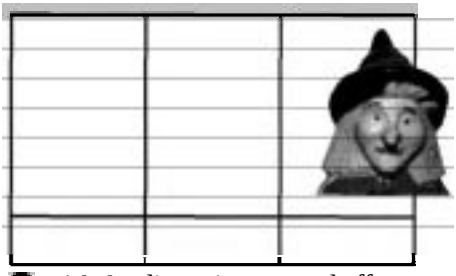
TIP In addition to allowing a graphic to appear outside the cell boundaries, you can also drag a table so that the table itself extends outside the text frame.



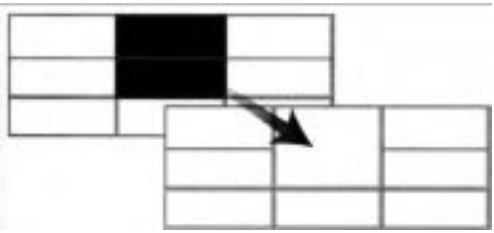
(54) *The* Clip Contents to Cell *option for inline graphics in a cell.*



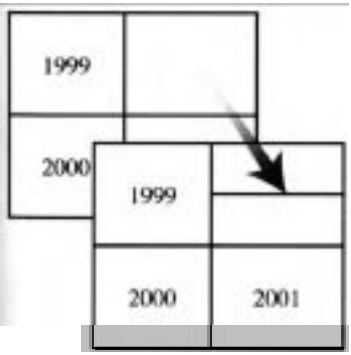
(55) *With the* clip options turned on, *an inline graphic is confined to the boundaries of the cell.*



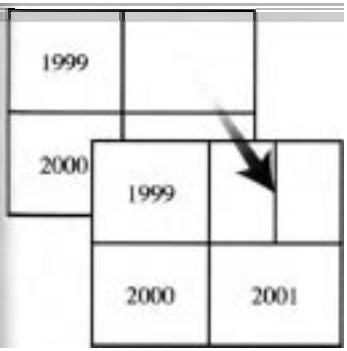
(56) *With the* clip options turned off, *an inline graphic extends outside the boundaries of the cell.*



57 *The results of using the* Merge Cells command.



58 *The results of using the* Split Cells Horizontally command.



59 *The results of using the* Split Cells Vertically command.

Customizing Cells

In addition to setting the controls for the entire table, you can also make settings for individual cells. You can customize the arrangement of rows and columns by merging or splitting cells. You may want to merge cells to fit more text within a cell. You can also change the space of text within a cell.

To merge cells:

1. Select the cells you want to merge.
2. Choose Table >Merge Cells. The dividers between the cells are deleted 57.

TIP If the merged cells contain text, the text will be divided into paragraphs.

To unmerge cells:

1. Select the cells you want to unmerge.
2. Choose Table > **Unmerge** Cells.

To split cells:

1. Select the cell you want to split.
2. Choose Table >Split Cells Vertically or Split Cells **Horizontally** 58 or 59.

TIP If you select multiple cells, only the Split Cells Vertically command is available.

You can also control how text is positioned horizontally and vertically with each cell.

TIP These settings are similar to how text is controlled within frames. ***(See page 70 for more information on setting the position of text within frames.)***

TIP These settings also control how inline graphics are positioned within frames.

To set the cell options for text:

1. Select the cells you want to adjust.
2. Choose Table > Cell Options > **Text.** This opens the Cell Options for text controls (60).
3. Use the four Cell Inset fields to adjust the amount of space between the text and the top, bottom, left, and right sides of the cells (61).
4. Choose one of the four settings from the Text Rotation menu to rotate the text in 90° increments.

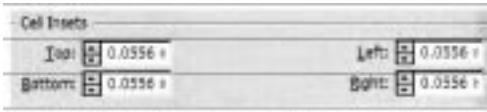
You can also set the vertical alignment for where the text is positioned in the cell.

To set the text vertical alignment:

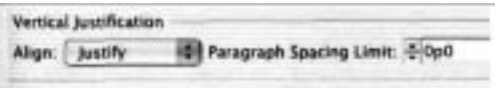
1. Select the cells you want to adjust.
2. Choose Table >Cell Options >Text. This opens the Cell Options dialog box for text controls.
3. Use the Vertical Justification Align menu to choose one of the four alignment options as follows:
   - Top positions the text at the top edge of the cell.
   - Center positions the text in the middle of the cell.
   - Bottom positions the text at the bottom edge of the cell.
   - Justify distributes the lines of text evenly so that it extends from the top to the bottom of the cell.

TIP The Justify setting overrides any leading applied to the text.

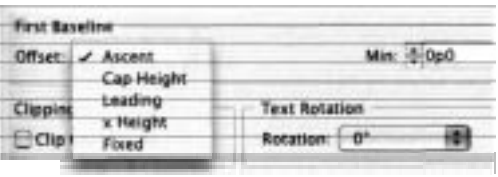
60 *The* Text area of the Cell **Options** *controls how text is positioned within each cell.*



61 *The* **Cell Insets controls** *let you specify how far away text sits from the edge of the cell.*



62 *When the Justify option is chosen in the Vertical Justification Align menu, the* Paragraph Spacing Limit control *is available.*



63 *The* First Baseline controls *let you set the position of the first baseline of text within a cell.*

If you choose Justify for the vertical alignment, you can then control the space between the lines or paragraphs.

To set the vertical justification spacing:

1. Select the cells you want to adjust.
2. Choose Table > **Cell** Options > Text. This opens the text controls for the cells.
3. Choose Justify from the Vertical Justification list.
4. Set an amount for the Paragraph Spacing Limit 62.

TIP Increase the value for the paragraph spacing to avoid increasing the space between the lines within the paragraph. This is similar to setting the Vertical Justification for text frames (see page 71).

Just as you can control where the first baseline of text appears in a text frame, you can also control the position of the text baseline within a cell.

To control the first baseline in a cell:

1. Select the cells you want to control.
2. Choose Table > **Cell** Options > Text. This opens the text controls for the cells.
3. In the First Baseline area, use the Offset list to choose a setting 63.
4. In the Min field, set the minimum amount of space for the first baseline.

TIP For more details on working with the first baseline, see page 70.

Setting Borders, Strokes, and Fills

One of the benefits of using tables instead of tabs is how easy it is to add lines and colors to the table. (The line around a table is called the ***border.*** Lines around cells are called ***strokes.*** Colors inside the cells are called ***fills*** (64).)

To add a border around the table:

1. Select at least one cell in the table.
2. Choose Table >Table Options >Table Setup. The Table Options dialog box opens with the Table Setup options selected (65).
3. In the Table Border category, use the Weight field to set the thickness of the borderlline (66).
4. Use the Color list to set the color of the borderlline.
5. Use the Tint field to apply a screen to the color.
6. If desired, check overprint for the color *(see page 136).*
7. Use the Type list to set a stripe pattern for the border.

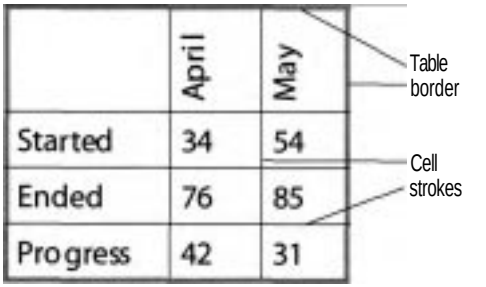
If you have applied a stroke to a cell that touches the table border, the Preserve Local Formatting checkbox controls how the table border changes the local settings to cells.

To preserve the formatting applied to cells:

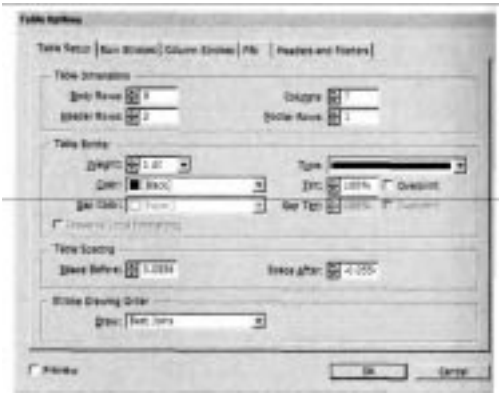
1. Apple a stroke to the cells ***(see the next page for how to apply strokes to cells).***
2. In the Table Options dialog box, select Preserve Local Formatting to maintain the appearance of the cell edges that touch the table border (67).

   or

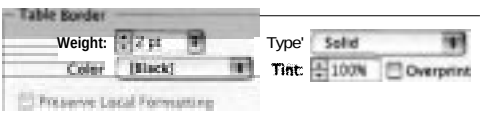
   Deselect Preserve Local Formatting to allow the table border to override the stroke applied to the cell.



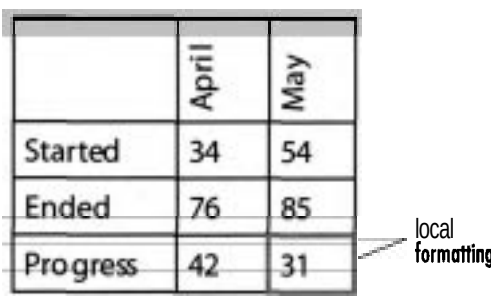
(64) ***The*** table border ***goes around the outside of a table.***



(65) ***The*** Table Setup dialog box ***lets you apply a border around the entire table.***

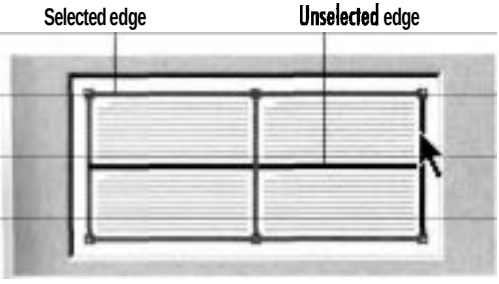


(66) ***You can format the line around a table with the*** Table Border controls.

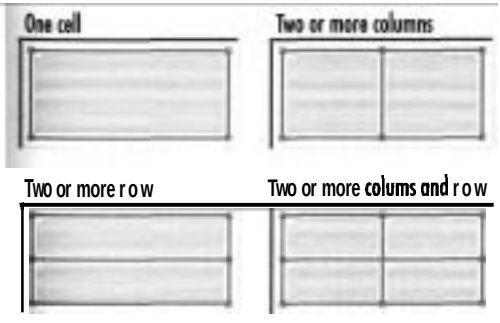


(67) ***The*** Preserve Local Formatting option ***maintains the appearance of cells that touch the table border.***

68 ***The*** Strokes and Fills controls ***under Cell Options let you format cells in a table.***



69 ***Click the*** proxy lines **for** the cell stroke ***to control which edges of the cell are stroked. The colored lines indicate the edge is selected.***



70 ***The*** cell preview area ***changes depending on how many cells, rows, or columns are selected.***

Tables are automatically created with strokes around the cells. You can remove those cell strokes, apply new ones, or customize them as you see fit.

To customize the strokes around individual cells:

1. Select the cells you want to modify.
2. Choose Table > **Cell** Options > Strokes **and Fills.** The Cell Options dialog box appears **with** the Strokes and Fills options selected **68**.
3. Click the proxy lines in the cell preview to select which edges of the selected cells should be formatted **69**. The top, bottom, left, and right edges of the preview area correspond to the position of the edges in the selected cells.

TIP Important! Select and deselect the proxy lines in the cell preview *first* before you change any of the settings in the dialog box. This avoids applying partial settings to the cells.

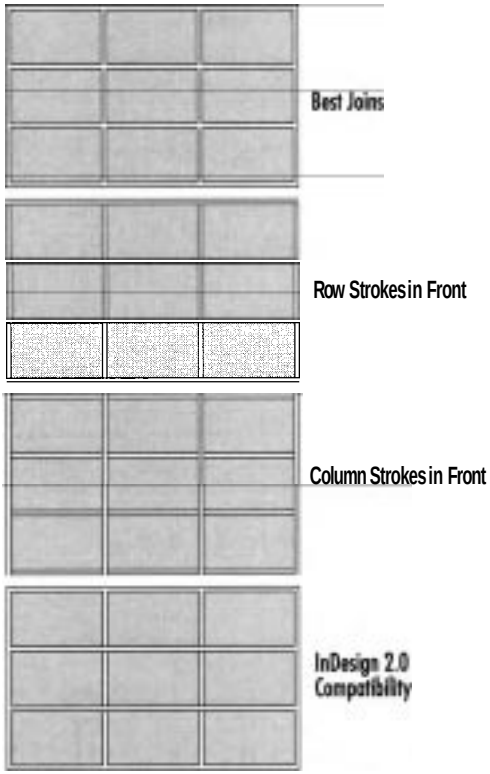
TIP The cell preview area changes depending on the combination of cells, rows, or columns you have selected **70**.

4. Set the controls under Cell Stroke to format the appearance of the selected edges.
5. Click OK to apply the settings.

If all your strokes are the same solid color, you don't have to worry about how the table is drawn, But as soon as you mix strokes or use non-solid strokes, you need to set preferences for how the strokes appear when they cross each other.

To set the stacking order for the border and strokes:

1. Select at least one cell in the table.
2. Choose Table >Table Options >Table Setup. The Table Options dialog box appears.
3. Choose one of the following from the Draw menu 71:
   - Best Joins lets InDesign create the best possible appearance for how the strokes intersect.
   - Columns in Front of Strokes moves the strokes for the columns in front of the strokes for the rows.
   - Rows in Front of Strokes moves the strokes for the rows in front of the strokes for the columns.
   - InDesign 2.0 Compatibility uses a combination of the Best Joins for the table border and the Rows in Front of the Strokes for the interior cells.



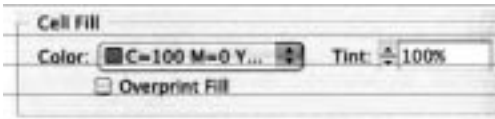
71 *Examples of how the* Draw menu settings *are applied to tables.*

You can also fill the inside of a cell with a color or gradient.

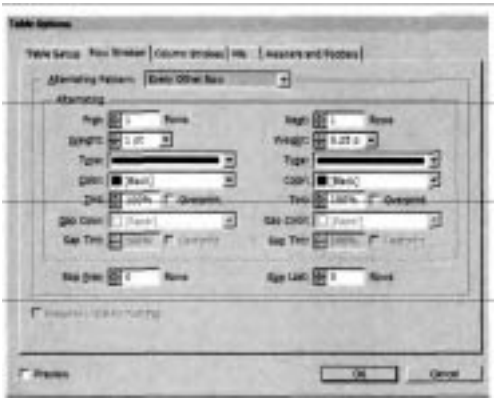
To customize the fill inside individual cells:

1. Select the cells you want to modify.
2. Choose Table > Cell Options >Strokes and Fills. The Cell Options dialog box opens set to Strokes and Fills.
3. Set the controls under Cell Fill to format the color inside the selected cells 72.

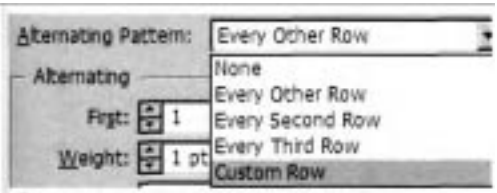
TIP If you have already defined a gradient swatch, you can fill the selected cells with a gradient.



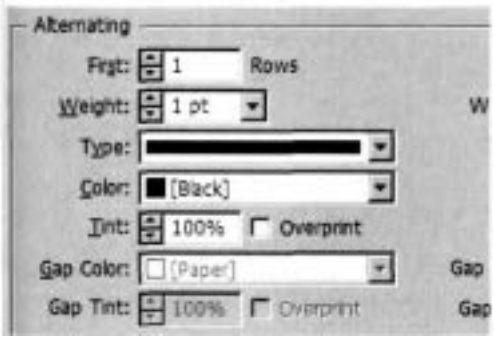
72 *The* Cell Fill controls *let you apply colors to individual cells in a table.*



73 ***The*** Table Options for Row Strokes ***allow you to apply alternatingpatterns for the strokes applied to rows.***



74 ***The*** **Alternating Pattern menu** ***for setting table rows.***



75 ***The*** Alternating controls ***allow you to choose the appearance for the alternating row strokes.***

Alternating Strokes and Fills

Many people who work with tables find it helpful to set alternating strokes or fills for entire rows or columns in repeating patterns. This can help readers easily navigate down the column or across the row in lengthy tables.

TIP Even if you insert or delete rows or columns, the Alternating Pattern feature automatically reapplies the correct sequence of fills to your table.

To alternate repeating strokes for rows:

1. Select at least one cell in the table.
2. Choose Table >Table Options > Alternating Row Strokes. The Table Options dialog box opens set to the Row Strokes tab **73**.
3. Use the Alternating Pattern list to choose how frequently the row strokes will alternate **74**.
4. Set the controls on the left side of the Alternating area to format the stroke appearance for the first set of rows **75**.
5. Set the controls on the right side of the Alternating area to format the appearance of the stroke for the next or second set of rows.
6. Use the Skip First and Skip Last fields to omit certain columns at the start and end of the table from the alternating count.

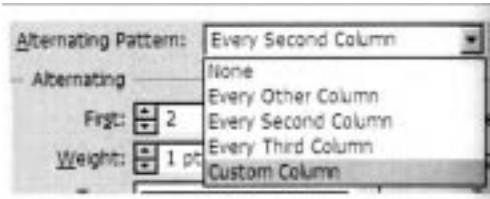
TIP If you have applied custom strokes to individual cells and want to override the local formatting, uncheck the Preserve Local Formatting checkbox.

To alternate repeating strokes for columns:

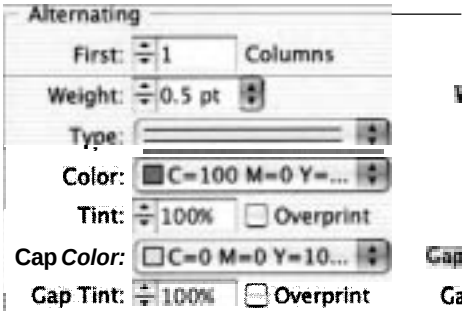
1. Select at least one cell in the table.
2. Choose Table >Table Options > Alternating Column Strokes. The Table Options dialog box opens set to Column Strokes ⓰.
3. Use the Alternating Pattern list to choose how many column strokes will alternate ⓱.
4. Set the controls on the left side of the Alternating area to format the appearance of the stroke for the first set of columns ⓲.
5. Set the controls on the right side of the Alternating area to format the appearance for the second set of columns.
6. Use the Skip First and Skip Last fields to omit certain columns at the start and end of the table from the alternating count.

TIP If you have applied strokes to individual cells, the Preserve Local Formatting command controls if the alternating strokes for columns override that local formatting.

⓰ *The* Column Strokes controls *under Table Options let you apply automatic alternating strokes to table columns.*

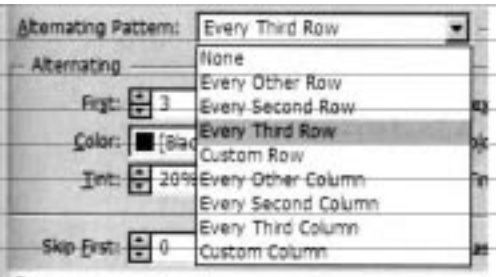


⓱ *The* Alternating Pattern menu *for table columns.*

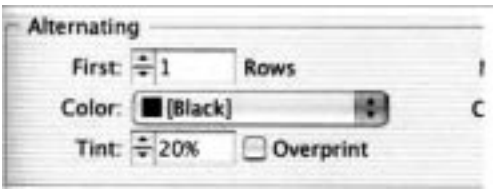


⓲ *The* Alternating controls *allow you to choose the appearance for the alternating column strokes.*

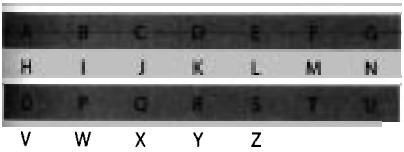
79 *The* Pills controls *under Table Options let you apply automatic alternatingfills to table rows or columns.*



80 *The* Alternating Pattern menu *for setting tablefills.*



81 *The* Alternating controls *allow you to choose the appearance for the alternatingfills.*



82 *An example of a table that uses the* alternating fills *for repeating rows.*

To alternate repeating fills:

1. Select at least one cell in the table.
2. Choose Table >Table Options > Alternating Fills. The Table Options dialog box appears set to Fills 79.

   or

   Choose Table Options >Alternating Fills from the Table palette.
3. Use the Alternating Pattern list to choose how many row or column fills will alternate 80.
4. Set the controls on the left side of the Alternating area to format the appearance of the fill for the first set of columns or rows 81.
5. Set the controls on the right side of the Alternating area to format the appearance for the second set of columns or rows.
6. Use the Skip First and Skip Last fields to omit certain rows or columns at the start and end of the table from the alternating count.

TIP If you have applied fills to individual cells, the Preserve Local Formatting command controls if the alternating fills override that local formatting.

TIP My own personal favorite is to set repeating fills of light and dark rows 82.

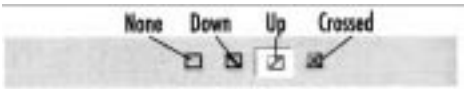
Adding Diagonal Lines in Cells

Many people who design tables use diagonal lines to indicate empty data or corrected information. InDesign lets you apply diagonal lines inside cells.

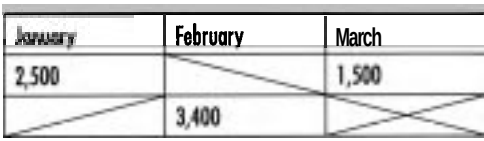
To add diagonal lines in cells:

1. Select the cells you want to modify.
2. Choose Table > Cell Options > Diagonal Lines. The Cell Options dialog box opens with the Diagonal Lines options selected 83.
3. Click one of the direction controls to set the direction of the diagonal lines 84 and their styles 85.
4. Set the Line Stroke options to format the appearance of the line 86.
5. Choose one of the following from the Draw menu:
   - Draw in Front positions the diagonal line in front of any text in the cell.
   - Draw in Back positions the diagonal line behind any text in the cell.

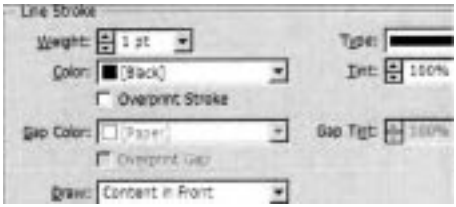
83 *The* Diagonal Lines controls *under Cell Options let you add diagonal lines to cells.*



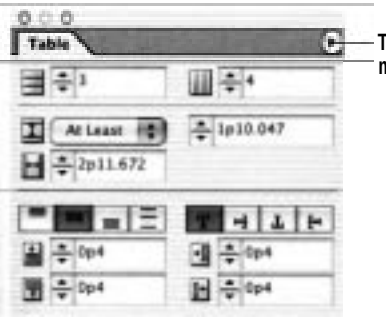
84 *The* direction controls *for the diagonal lines in cells.*



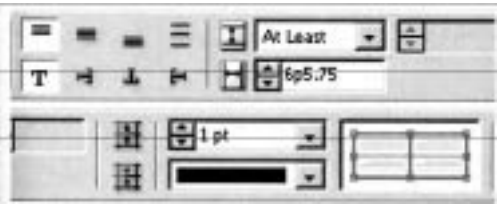
85 *Examples of how the diagonal line can be used in cells.*



86 *The* Line Stroke controls *for diagonal lines let you style the appearance of the diagonal lines inside cells.*



87 *The* Table palette *provides an* ***onscreen*** *palette to* ***modify*** *many of the table controls.*



88 *When a table is selected, the Control palette displays some of the* table controls.

Using the Table or Control palettes

You can also work with the Table palette or the Control palette to modify the number of columns and rows, their width and height, and other settings in tables.

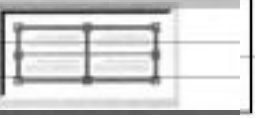
To work with the Table palette or Control palette:

1. Select the table or cells in the table.
2. Choose Window >Type & Tables >Table. This opens the Table palette 87.

   or

   Choose Window >Control. This opens the Control palette 88.
3. Use the control, fields, and icons as shown in the following chart the table.

Table feature	Iton
Number of rows	4
Number of columns	3
Row height menu	Exactly
Row height	1p4.32
Column width control	6p5.75
Text vertical justification	
Text rotation	
There are four controls that are only found in the Table **palette**	
Top cell inset	0p4
Bottom cell inset	0p4
Left cell inset	0p4
Right cell inset	0p4

Table feature	Icon
There are also some table features that are only in the Control Palette	
Merge cells	
Unmerge cells	
Stroke weight	
Stroke type	
Cell preview	

TIP You can also use the commands in the Table palette menu or Control palette menu to modify the table.

AUTOMATING TEXT 14

I have a general rule about working with a computer. Anytime I find myself doing the same thing more than ten times in a row, I stop. Most likely there is a command or tool that I can use to automate the process.

That's what this chapter is about—learning how to automate InDesign so the application does the dull, tedious chores for you. (Sadly, I can't apply this rule to other parts of my life, such as washing dishes or folding socks.)

Some of these features, such as Find/Change and Spell Check, are very straightforward. You simply choose the command and let InDesign do its stuff.

Others, such as styles and nested styles, need a little bit of preparation to make them work their magic.

Of course you're not required to learn any of these automation features. You are perfectly welcome to modify text by hand, one word at a time—especially if you don't care about doing anything else in your life.

Changing Case

InDesign gives you a command to quickly change text case.

To change text case:

1. Select the text you want to change.
2. Choose Type >Change Case and then choose lowercase, Title Case, Sentence case, or UPPERCASE from the submenu ❶.

changing case Lowercase
Changing Case Title Case
Changingcase Sentence Case
CHANGING CASE Uppercase

❶ ***The*** Change Case options ***change text as shown.***

Checking Spelling

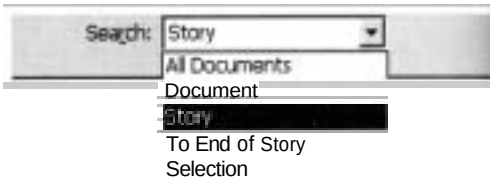
One of the most popular features of page layout programs is the spelling checker which searches a document for misspelled words.

To use the spell check command:

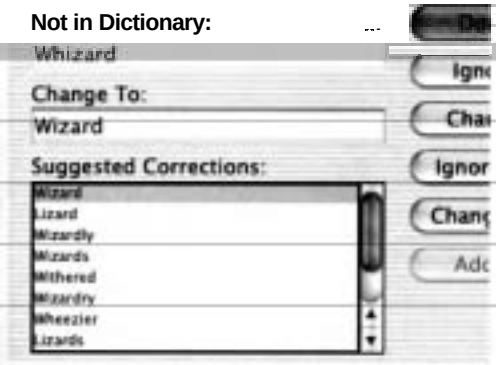
1. To check the spelling in a specific text frame or linked frames, click to place an insertion point anywhere within the text.
2. Choose Edit >Check Spelling. The Check Spelling dialog box appears ❷.
3. In the Search list, choose where the spelling check should be performed ❸:
   - ***All*** Documents checks all open documents.
   - Document checks the entire active document.
   - Story checks **all** the linked frames of the selected text.
   - To End of Story checks from the insertion point.
   - Selection checks only the selected text.
4. Click Start to begin the spell check. InDesign searches through the text, then stops and displays each error it finds.

TIP InDesign displays words that aren't in its dictionary, duplicate words, and capitalization errors.

❷ ***The*** Check Spelling dialog box ***is the command center for a spell check.***



❸ ***The*** Search list ***allows*** you ***to specify where the spell check is performed.***



❶ *InDesign gives you a list of* suggested corrections *for the unknown words found during a spell check.*

The spell check may display a word that is correctly spelled. This could be a specialized term (like *InDesign*) or a proper name (like *Sandee)*. If you have words like that, you will want to instruct the spell check to ignore a specialized word.

To ignore specialized words:

- Click Ignore to continue the check without changing that instance of the text.

  or

  Click Ignore All to continue the spell check without changing any instance of that text.

TIP Once you press the Start button, it then turns into the Ignore button.

Of course, the spell check wouldn't be very helpful if it couldn't make changes to suspected words.

To correct the error displayed:

1. Type a correction in the Change To box.

   or

   Select a word from the Suggested Corrections list ❶.

2. Click Change to change only that instance of the word in the text.

   or

   Click Change *All* to change **all** instances of the word in the text.

The Limitations of the Spell Check

Every once in a while, I read an article about how the use of spelling checkers in computers is contributing to the death of proper writing and language. It's true; too many people run a spell check and don't bother to actually read the document. Consider the following text:

Their is knot any thing wrung with using a spell cheque on a sent tents in a doc you mint. Ewe just haft to clique the write butt ends.

Obviously the paragraph is utter nonsense. Yet InDesign's spell check (as well as the spell check in most other programs) wouldn't flag a single word as being incorrect.

A spell check only flags words it doesn't recognize; but since everything in the paragraph is an actual word, InDesign doesn't see any problems. So, please, don't skip a session with a proofreader just because you've run a spell check.

The Ignore commands only work during a particular session of InDesign. If you use specialized words frequently, you should add them to the dictionary that InDesign uses during a spell check.

To add words to the spell check dictionary:

- Click Add when the word is displayed during the spelling check.

To edit the dictionary:

1. Choose Edit>Edit Dictionary to open the Dictionary dialog box ❺.
2. Choose the language from the Language list.

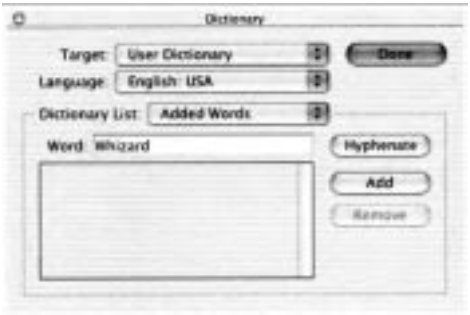
TIP If you have only one language in the Language list, you need to do a custom installation of InDesign to install the rest of the language dictionaries.

3. Choose Added Words or Removed Words from the Dictionary List.
4. Type the word you want to add in the Word field.

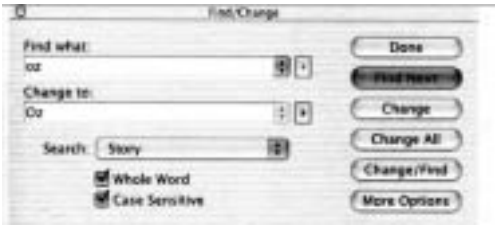
   or

   Click the word you want to remove.
5. Click the Add or Remove button.

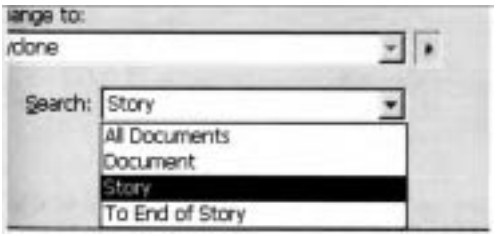
TIP The words in the Dictionary also help you control hyphenation. ***(For more information on working with hyphenation, see Chapter 15, "Typography Controls.")***



❺ ***The*** Dictionary dialog box ***allows you to add or delete words in the dictionary used during a spell check.***



❽ *The* **Find/Change dialog box** *allows you to set the controls for searching for and replacing text.*



❼ *The* **Search** list *in the Find/Change dialog box allows you to set where the search takes place.*

Finding and Changing Text

InDesign has a powerful **Find/Change** command that lets you find all instances of text or formatting and make changes to the found items. The simplest **Find/Change** command looks for certain characters of text, called ***text strings,*** and changes them. For instance, you can change ***Sept.*** into ***September.***

To set the Find/Change text strings:

1. To find and change within a specific text frame or linked frames, click to place an insertion point within the text.
2. Choose Edit > **Find/Change.** The Find/Change dialog box appears ❽.
3. In the Find What field, type or paste the text you want to search for.
4. In the Change To field, type or paste the text to be inserted.
5. In the Search pop-up list, choose where the search should be performed ❼:
   - ***All*** Documents checks all open documents.
   - Document checks the entire document.
   - Story checks **all** the linked frames of the selected text.
   - To End of Story checks from the insertion point.
   - **Selection** checks only the selected text.
6. Select Case Sensitive to limit the search to text with the same capitalization. For instance, a case-sensitive search for "InDesign" does not find "Indesign".
7. Select Whole Word to disregard the text if it is contained within another word. For instance, a whole-word search for Design omits the instance in InDesign.
8. Click Start. InDesign looks through the text and selects each matching text string it finds.

As you run a FindIChange search, you can choose whether or not to apply changes.

To apply the Find/Change changes:

- Click Change to change the text without moving to the next instance.

  or

  Click Change/Find to change the text and move to the next instance.

  or

  Click Change *All* to change **all** the instances in the text.

You can tell InDesign to ignore or skip a FindIChange instance.

To ignore a Find/Change instance:

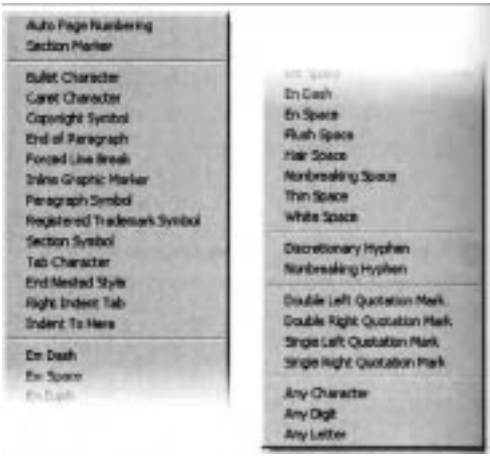
- Click Find Next to avoid changing that instance of the found text and skip to the next occurrence.

InDesign also lets you search for special characters such as spaces, hyphens, paragraph returns, tab characters, or inline graphic markers. These are called *metacharacters* for the FindIChange commands.

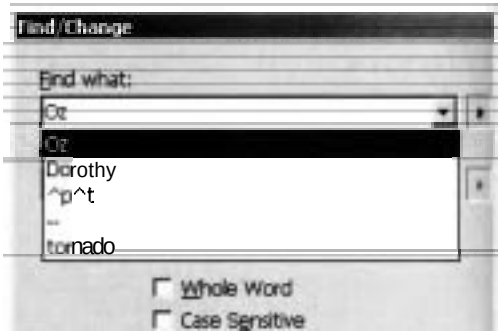
To Find/Change metacharacters:

1. Choose the character you want to look for in the Find what menu ❶.
2. Choose the character you want to substitute in the Change to menu.
3. Apply the FindIChange commands as described on the opposite page.

TIP InDesign also keeps a list of the past 15 text strings for both the Find what and the Change to fields. You can use that list to quickly reapply searches ❷.



❶ *The* metacharacters menu *for the* **Find** *whatfield.*



❷ *InDesign keeps a record of the past 15 text strings in the Find what or Change to fields.*

The expanded options *in the Find/Change dialog box.*

Working with Wildcard Characters

You cannot insert wildcard characters in the Change to field. However, that should not discourage you from working with wildcard characters.

The numbers for the steps of this book are an example of how I can format using wildcard characters. In the Find what field I enter ^9.^t, which is the code for any digit (^9), followed by a period (.), and the code for a tab (^t).

I set the formatting for the number style in the Change to field. InDesign searches for any number followed by a period and a tab and applies the proper formatting as set in the Change to field.

In addition to text strings, you can also Find/Change formatting. This helps when making changes to text imported from word-processing programs.

The Find what menu has three special meta-characters called ***wildcard*** characters. The wildcard characters allow you to search for items that are defined as a range of characters.

To search for wildcard characters:

1. Choose one of the wildcard characters from the Find what menu:
   - **Any** Character finds any character including spaces, tabs, returns, or text.
   - **Any** Digit searches for any number from 0 to **9.**
   - **Any Letter** searches for any alphabetical letter from **A** to Z.
2. Set the Change to options.
3. Run the search.

TIP You can only use wildcard characters in the Find what field, not in the Change to field. ***(See the sidebar on page 340 for a special project that shows how to use wildcard characters.)***

The Find/Change dialog box has additional options that let you search for more than just text strings. You can use the Find/Change dialog box to search for formatting options.

To expand the Find/Change options:

- Click More Options in the Find/Change dialog box. This opens the format options that let you change formatting attributes such as typestyle, size, paragraph attributes, character colors, and so on. ***(See the next exercises for setting the format options.)***

With the Find/Change dialog box expanded, you can set the formatting options for either the Find or Change fields.

To search for formatting options:

1. Click the Format button in the Find Format Settings area of the Find/Change dialog box. This opens the Find Format Settings dialog box ⓫.
2. Choose those formatting categories on the left side of the Find Format Settings dialog box ⓬. ***(See the chart on pages 324 and 325 for an explanation of what each category controls.)***
3. Enter the criteria you want to search for in the fields for the chosen category.

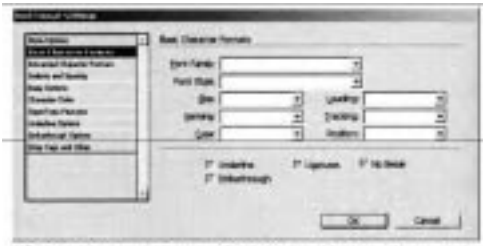
TIP For instance, if you want to search for all 12-point text, you would choose the Basic Character category and then enter 12 point in the point size.

4. Click OK. The search criteria are displayed in the Find Style Settings area ⓭.

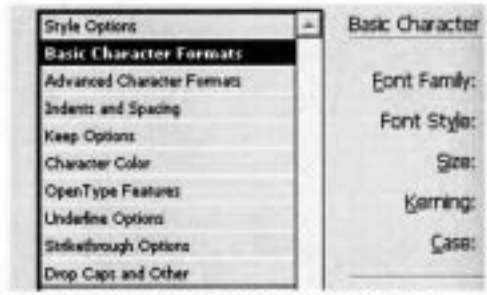
TIP Leave the Find what field blank to search for formatting without looking for specific text.

TIP There are three ways to set check boxes in the Find/Change dialog box. Click three times to see the choices ⓮:

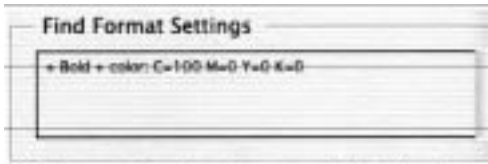
- On means the attribute will be searched or replaced. Use this to look for an attribute that has been applied to the text or to apply the attribute.
- Off means the attribute will not be searched or replaced. Use this to look for an attribute that has not been applied to the text or to remove the attribute.
- Maybe means the attribute may or may not be searched or replaced. Use this if you don't want to change the attribute from its current state.



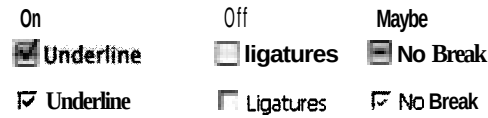
⓫ *The* **Find Format Settings dialog box** *lets you search for specific formatting options.*



⓬ *The categories for both the* **Find Format** Settings ***and*** Change Format Settings ***dialog boxes.***



⓭ **Formatting criteria** *appear in the Find Format Settings area of the Find/Change dialog box.*



⓮ ***The*** three states for check boxes ***in the Find/Change dialog box. Notice the difference between the Maybe state for the Mac (top) and Windows (bottom).***

⓯ *The alert symbol next to the Find what and Change to fields indicates that formatting options have been chosen as part of Find/Change.*

⓰ *Click the Clear button to delete all the format options from the Find/Change criteria.*

With the FindIChange dialog box expanded, you can set the formatting options for either the Find or Change fields.

To set the replacement formatting options:

1. Click the Format button in the Change Format Settings area of the FindIChange dialog box. This opens the Change Format Settings dialog box.

TIP This dialog box is identical to the Find Format Settings dialog box ⓫.

2. Choose those formatting categories on the left side of the Change Format Settings dialog box.
3. Enter the criteria you want to replace in the fields for the chosen category.

TIP For instance, if you want to make **all** the found text italic, you would choose the Basic Character category and then enter italic in the style.

4. Click OK. The replace criteria are displayed in the Find Style Settings area ⓭.

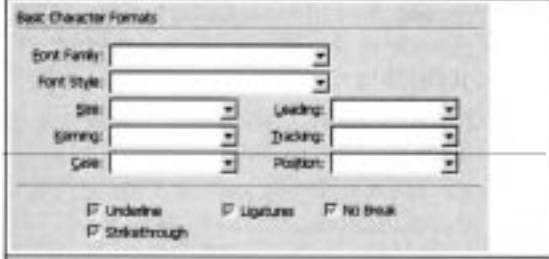
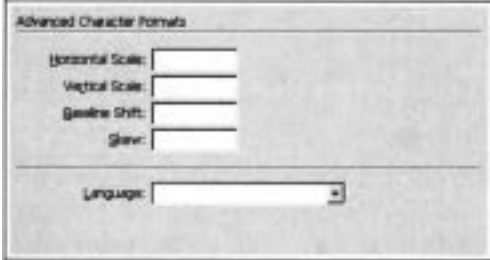
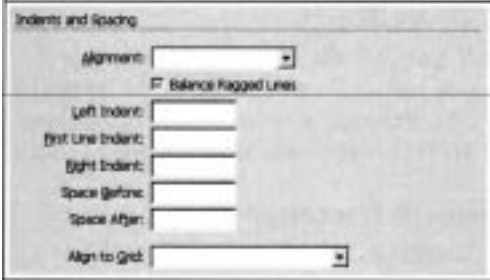
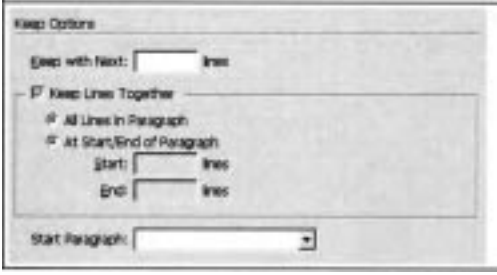
TIP An alert symbol next to the Find what or Change to fields indicates that formatting options are part of the FindIChange criteria ⓯.

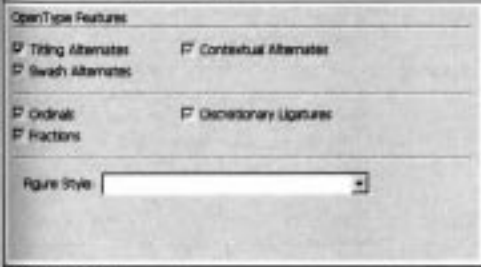
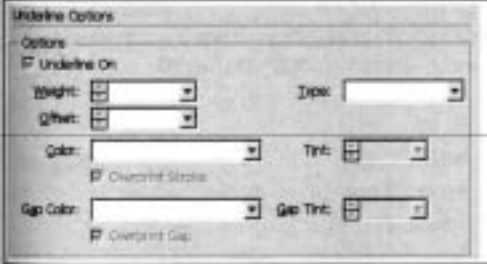
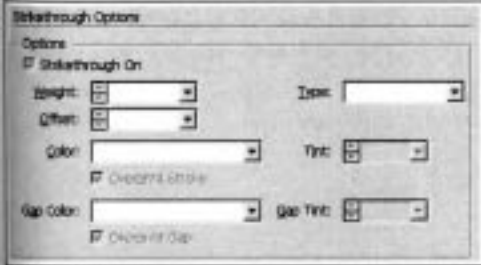
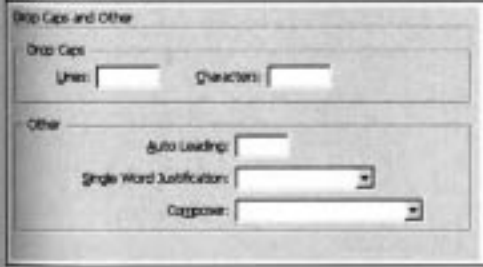
TIP If you click the Fewer Options button, you reduce the size of the FindIChange box, although you can still search for the Formatting options that are hidden.

To delete the formatting options:

- Click the Clear button to delete all the formatting in the Find Format Settings or Change Format Settings areas ⓰.

Find Dialog Box Settings

Find Format Settings dialog box appearance	Find/Change Features
	Style Options Lets you set the attributes using character and paragraph styles. *(See pages* 328–339 *for information on working with styles.)*
	**Basic Character Formats** Lets you set the character attributes for the text. *(See Chapter* 3 *for information on working with basic character formats.)*
	**Advanced Character Formats** Lets you set the character attributes for distorting text and setting the language. *(See Chapter* 3 *for information on working with character formats.)*
	**Indents and Spacing** Lets you set the paragraph attributes for alignment, indents, spacing, and align to baseline grid. *(See Chapter* 3 *for information on working with alignment, indents, and paragraph spaces. See Chapter 15 for information on aligning to baseline grid.)*
	**Keep Options** Lets you set the attributes for the Keep with Next lines options and where the paragraph starts. *(See Chapter* **14** *for information on working with the Keep Options.)*

Rnd Format Settings dialog box appearance	**Find/Change** Features
	Character Color Lets you set the attributes for the named colors and gradients applied from the Swatches palette. *(See Chapter* 5 *for information on working with color.)*
	**OpenType** Features Lets you set the attributes for applying the advanced typographic features in OpenType fonts. *(See Chapter* ***15*** *for information on working with OpenType.)*
	**Underline Options** Lets you set the attributes for applying specialty underline effects to type. *(See Chapter* 3 *for information on the underline options.)*
	**Strikethrough Options** Lets you set the attributes for applying specialty strikethrough effects to type. *(See Chapter* 3 *for information on the* ***strike-*** *through options.)*
	**Drop Caps and Other** Lets you set the attributes for drop caps, leading, justification, and the composer. *(See page* 342 *for information on the drop caps. See Chapter* **3** *for information on the other options.)*

Using the Story Editor

For people like me, one of the ***good*** things about electronic page layout is that I edit text as it appears on the page.

For others, one of the ***bad*** things about electronic page layout is that they edit text as it appears on the page. Those people like to use a story editor which lets them edit text in a separate window. This means you can type or edit text without getting distracted by typefaces, sizes, images, and other design elements ⓱.

To use the Story Editor:

1. Select the text frame that contains the text you want to edit or place your insertion point inside the text.
2. Choose Edit > **Edit** in Story Editor. The Story Editor opens.
3. Use the right side of the Story Editor to make changes to the text. Any changes you make in the Story Editor appear on the document page.
4. Use the left side of the Story Editor to view the paragraph styles that may have been assigned to the text ⓲. ***(See pages 328–339 for information on styles.)***

TIP The text within tables cannot be displayed in the Story Editor.

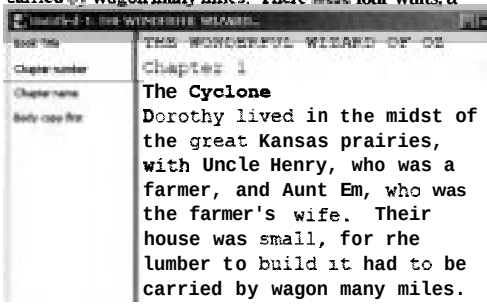
TIP The Story Editor appears as a separate window from your document page. You don't have to close the Story Editor to move back to the document. Just click the document page to work on it; then click to move back to the Story Editor.

THE WONDERFUL WIZARD OF OZ

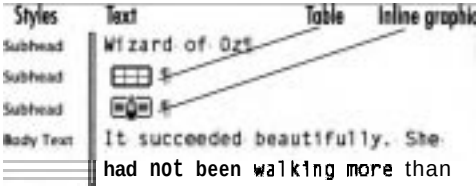
Chapter 1

The Cyclone

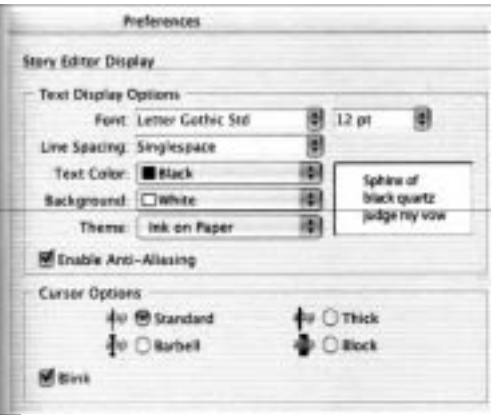
Dorothy lived in the midst of the great Kansas prairies, with Uncle Henry, who was a farmer, and *Aunt Em*, who was the farmer's wife. Their house was small, for the lumber to build it had to be carried by wagon many miles. There were four waits, a



⓱ ***Text is displayed in the*** Story Editor ***without most of its special formatting. This makes it easier to make changes to the text.***

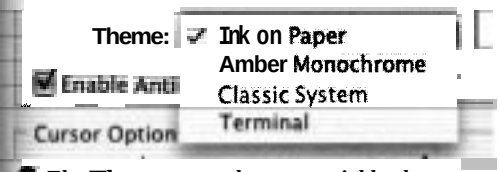


⓲ ***The Story Editor displays the various elements within the story.***

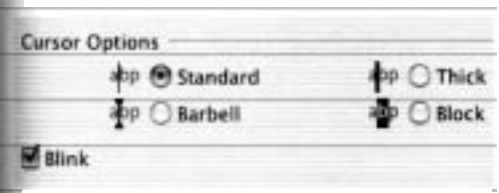


19 *The* Story Editor Display *section of the Preferences allows you to set the appearance of the Story Editor.*

20 *The* Line Spacing menu *of the Story Editor Preferences controls the space between the lines of text.*



21 *The* Theme menu *lets you quickly change the text and background colors.*



22 *The* Cursor Options *change the display of the cursor within the text.*

You can change the display of the Story Editor by changing the preference settings.

TIP None of these settings affect the appearance of the text in the layout.

To set the preferences for text display:

1. Choose Edit >Preferences >Story Editor Display (Win) or **InDesign** > Preferences >Story Editor Display (Mac) **19**.
2. Use the Font menu to set the typeface.
3. Use the point size menu to set the size.
4. Use the Line Spacing menu to choose the leading between the lines **20**.
5. Use the Text Color menu to set the color of the text.
6. Use the Background menu to set the color of the Story Editor window background.

   or

   Use the Theme menu to choose one of the preset text and background color schemes **21**.
7. Deselect Enable Anti-Aliasing to make the edges of the text sharper.

You can also change how the cursor, or insertion point, is displayed within the Story Editor. This is helpful for those who are used to editing text on mainframe terminals.

To set the preferences for cursor display:

1. Choose Edit >Preferences >Story Editor Display (Win) or **InDesign** > Preferences >Story Editor Display (Mac).
2. Choose one of the Cursor Options **22**.
3. Select Blink to make the cursor turn on and off within the text.

Defining Styles

Styles are the most powerful feature for applying formatting. InDesign has two types of styles. *Paragraph styles* apply formatting for both character and paragraph attributes. *Character styles* apply formatting for only character attributes. *(For more information on working with character and paragraph attributes, see Chapter 3, "Basic Text.")*

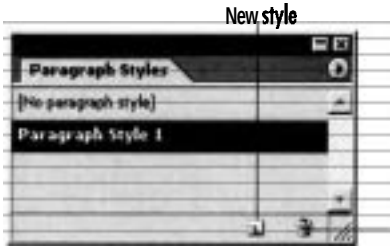
You can use the Paragraph Styles palette to define new paragraph styles for a document.

To define a paragraph style manually:

1. Choose Type >Paragraph Styles. This opens the Paragraph Styles palette ㉓.
2. Choose New Style from the Paragraph Styles palette menu.

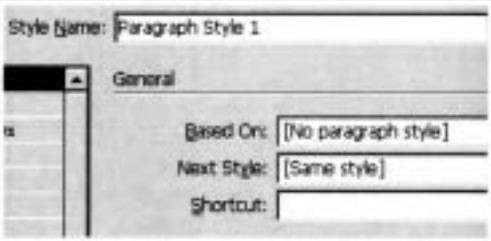
   or

   Opt/Alt-click the New Style icon in the Paragraph Styles palette. This opens the New Paragraph Style dialog box set to the General options ㉔.
3. Use the Style Name field to name the style ㉕.
4. Set the Based On, Next Style, and Shortcuts as described on pages 332,334, and 335.
5. Click each category on the left side of the dialog box ㉖.
6. Set the criteria for each category. *(See the chart on pages 329–331 for more information on each category.)*
7. Click OK to define the style. The name of the style appears in the Paragraph Styles palette.

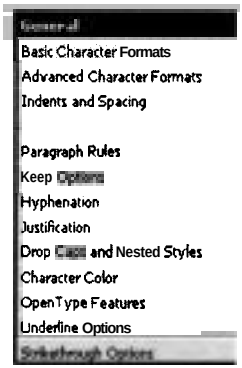


㉓ *The* Paragraph Styles palette *lets you define and apply paragraph styles.*

㉔ *The* New Paragraph Style dialog box *contains the settings for defining a paragraph style.*



㉕ *Use the* Style Name field *to enter the name of a paragraph style.*



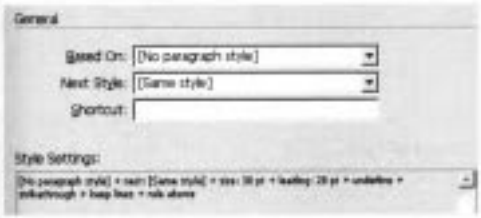
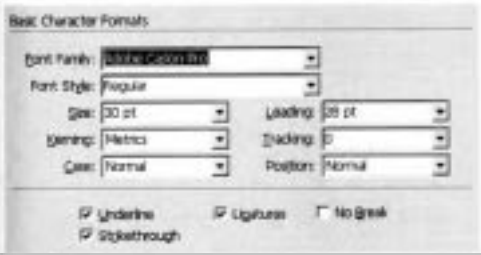
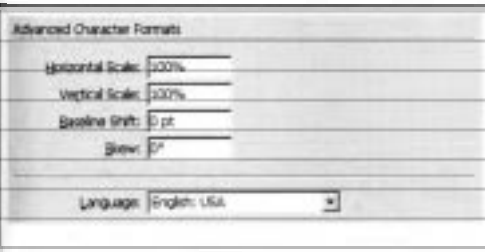
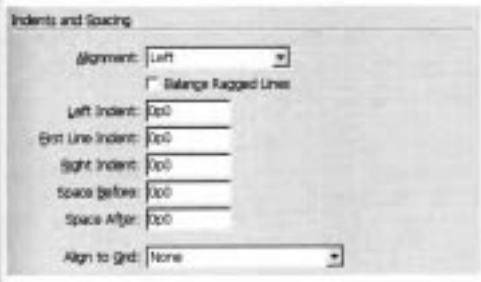
㉖ *Click each* category *in* the Paragraph Styles *dialog box to set the format of the style.*

Paragraph Style Categories

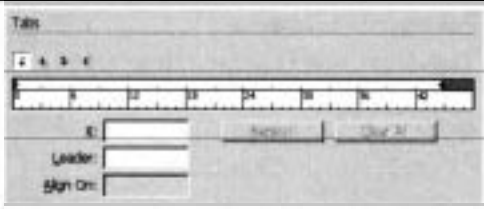
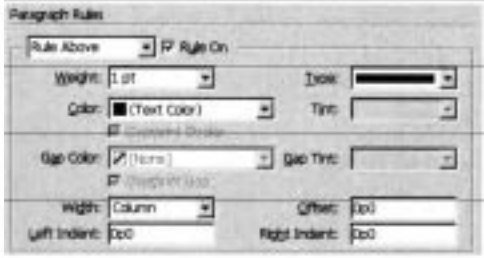
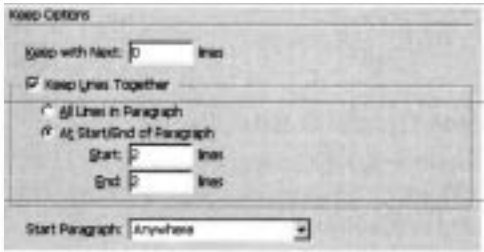
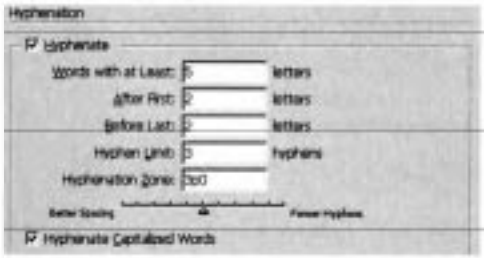
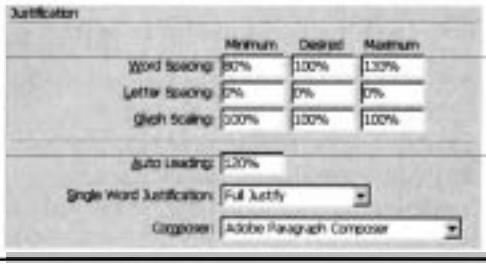
Paragraph Style Features

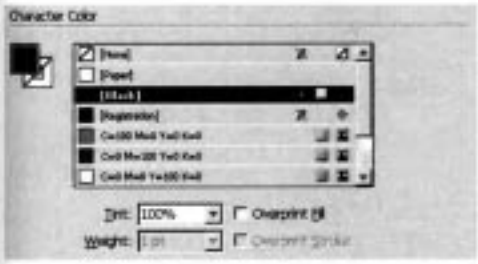
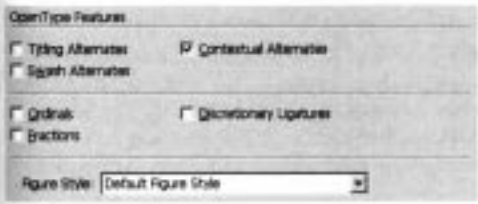
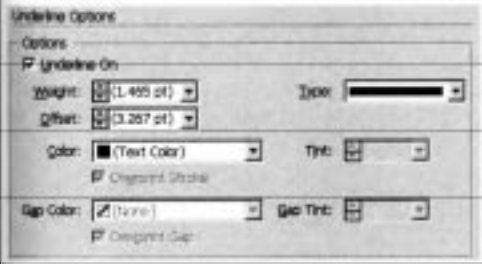
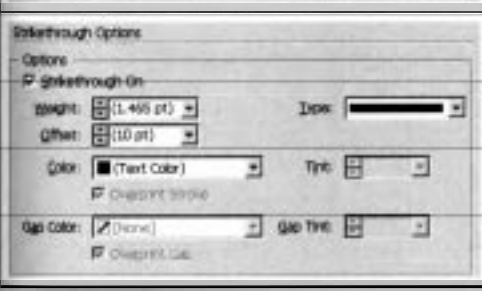
These are categories that you set for paragraph styles.

TIP If this is your first time setting paragraph styles, relax, you don't have to set all the options for every category. Leave some of the advanced option at their defaults as you first learn how to define and apply styles.

Dialog Box Options	Description
	**General Options** Lets you base one style on another, set the next style and the keyboard shortcut. *(See pages* **332–335** *for information on these options.)*
	**Basic Character Formats** Lets you set the character attributes. *(See Chapter 3 for information on working with basic character formats.)* TIP This dialog box also appears when defining character styles.
	**Advanced Character Formats** Lets you set the attributes to distort text and set the language. *(See Chapter* **3** *for information on working with basic character formats.)* TIP This dialog box also appears when defining character styles.
	**Indents and Spacing** Lets you set the attributes for the alignment, indents, spacing, and align to baseline grid. *(See Chapter* **3** *for information on working with alignment, indents, and paragraph spaces. See Chapter 15 for information on aligning to baseline grid.)*

Continued on the next page

Dialog Box Options	Description
	**Tabs** Lets you apply the settings for the tabs for the paragraph style. ***(See Chapter 13 for information on working with the tabs.)***
	**Paragraph Rules** Lets you apply rules above or below the paragraph. ***(See Chapter 9 for information on working with paragraph rules.)***
	**Keep Options** Lets you set the attributes for the Keep with Next lines options and where the paragraph starts. ***(See Chapter 14 for information on working with the Keep options.)***
	**Hyphenation** Lets you control how hyphenation is applied to the paragraph. ***(See Chapter 15 for information on working with hyphenation.)***
	**Justification** Lets you control how text is expanded or contracted when the Justified paragraph alignment is applied. ***(See Chapter 15 for information on working with the justification settings.)***

Dialog Box Options	Description
	Drop Caps and Nested Styles Lets you set the attributes to apply local character styles to drop cap characters and special nested character styles. ***(See pages 342–347 for working with character styles for Drop Caps and Nested Styles.)***
	**Character Color** Lets you set the attributes for the named colors and gradients applied to characters from the Swatches palette. ***(See Chapter 5 for information on working with color.)*** TIP This dialog box also appears when defining character styles.
	**OpenType Features** Lets you set the attributes for applying the advanced typographic features in OpenType fonts. ***(See Chapter 15 for information on working with OpenType.)*** TIP This dialog box also appears when defining character styles.
	**Underline Options** Lets you set the attributes for applying specialty underline effects to type. ***(See Chapter 3 for information on the underline options.)*** TIP This dialog box also appears when defining character styles.
	**Strikethrough Options** Lets you set the attributes for applying specialty strikethrough effects to type. ***(See Chapter 3 for information on the strikethrough options.)*** TIP This dialog box also appears when defining character styles.

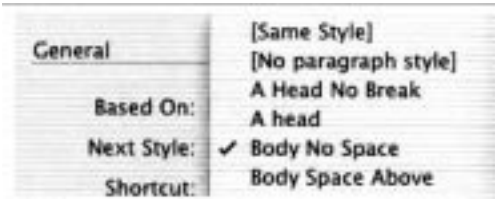
Defining Styles (continued)

The easier way to define a style is to format the text and define the style by example.

To define a paragraph style by example:

1. Select a sample paragraph.
2. Use the Character and Paragraph palettes and any other commands to format the text.
3. Leave the insertion point in the formatted paragraph.
4. Choose Type >**Paragraph** Styles.
5. With the insertion point blinking in the formatted text, click the New Style icon. This adds a new style to the Paragraph Styles palette.

TIP Double-click to rename the style created by the New Style icon.



㉗ *The* **Next Style menu** *lets you choose the Same Style or an already defined style.*

The Next Style command allows you to automatically switch to a new style as you type text. For instance, when I press the paragraph return after this paragraph, I automatically switch to the style for the exercise header.

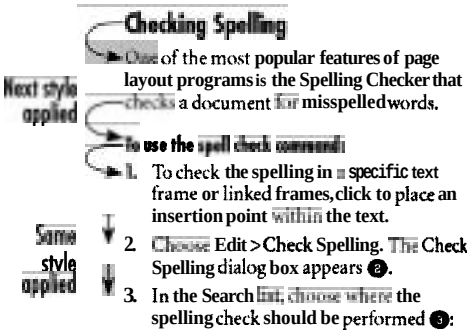
To set the next paragraph style:

1. Select the General category in the New Paragraph Style dialog box ㉗.
2. Choose a style from the Next Style list in the New Paragraph Style dialog box. The chosen style is applied to the next paragraph when you press the Return key ㉘.

   or

   Choose Same Style from the Next Style list. This retains the original style until you manually change the style ㉘.

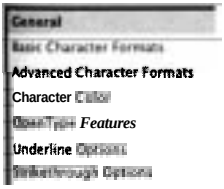
TIP The Next Style command is only available when you press the return key. It does nothing to text that already is in the story.



㉘ *The* **Next Style command** *automatically changes the paragraph style when a paragraph return is pressed (curved arrows). The* **Same Style command** *keeps the style when the paragraph return is pressed (straight arrows).*

30 ***The*** Character Styles palette ***lets you define and apply character styles.***

31 ***The*** New Character Style dialog box ***contains the settings for setting each of the categories for character styles.***



32 ***Click each*** category in the Character style ***dialog box to set the format of the style.***

Character styles allow you to set specific attributes that override the paragraph style character attributes. For instance, this bold text was set by applying a character style to the paragraph style.

To define a character style:

1. Choose Type >Character Styles. This opens the Character Styles palette **30**.
2. Choose New Style from the Character Styles palette menu. This opens the New Character Style dialog box **31**.
3. Name the style.
4. Set the Based On and Shortcut controls as described on page 334 and 335.
5. Click each category to set the character attributes **32**.
6. Click OK to define the style. The name of the style appears in the Character Styles palette.

You can also format the text and then define a character style by example.

To define a character style by example:

1. Select a sample paragraph.
2. Use the Character palette and other commands to format the text.

TIP It does not matter what paragraph attributes are applied to this text. Only the character attributes are set by example.

3. Leave the insertion point in the newly formatted text.
4. Choose Type >Character Styles.
5. Click the New Style icon. This adds a new style to the Character Styles palette.

Basing one style on another makes it easy to coordinate multiple styles.

To base one style on another:

1. Start with at least one paragraph or character style.
2. Open the dialog box to define a new style.
3. From the Based On pop-up menu, choose the style you want to use as the foundation of the new style.
4. Make changes to define the second style attributes.

TIP The changes to the second style are displayed in the Style Settings area (32).

TIP Any changes you make later to the original style also affect the second style.

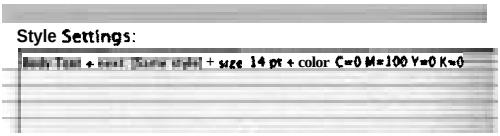
Rather than create a new style from scratch, it may be easier to duplicate an existing style and then redefine it.

To duplicate a style:

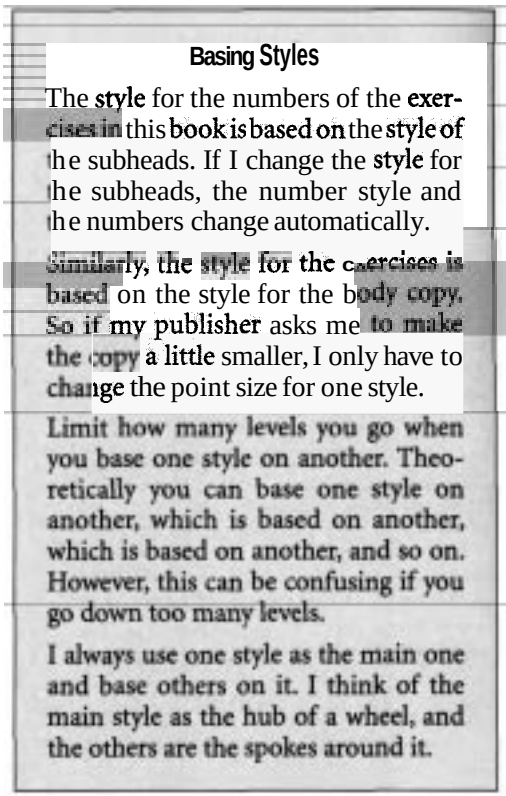
1. Select the style.
2. Drag the style onto the New Style icon in the Paragraph Styles palette.

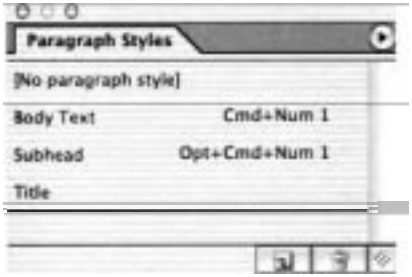
   or

   Choose Duplicate Style from the Paragraph Styles palette menu.



(32) *When you base a new style on an existing style, you can read how they differ in the Style Settings field of the New Style dialog box.*





33 *The* **keyboard shortcut for a style** *is listed next to the name of the style.*

You can also set keyboard shortcuts for paragraph and character styles. This makes it easy to apply styles as you type.

To set style keyboard shortcuts:

1. Open the New Paragraph Style or New Character Style dialog box.

   or

   Double-click the name of the style to open the Modify Paragraph Style or Modify Character Style dialog box.

2. Place an insertion point in the Shortcut field.
3. Press a number from the number pad plus a keyboard modifier. The keyboard modifiers can be a combination of one or more of the following keys:
   - Cmd (Mac) or Ctrl (Win) keys.
   - Shift key.
   - Opt (Mac) or Alt (Win) keys.

TIP In Windows, the Num Lock must be turned on to set keyboard shortcuts.

TIP The keyboard shortcut appears next to the style name in the Paragraph Styles or Character Styles palettes 33.

Style Guidelines

Styles are listed alphabetically in the two styles palettes. So if you want styles to be listed together, give them similar names.

For instance, I have three different paragraph styles for the numbered lists in this book. Each style starts with the name *list item* and is followed by a descriptive word such as *list item body, list item bullet,* and so on. This groups the styles together in the Paragraph Styles palette.

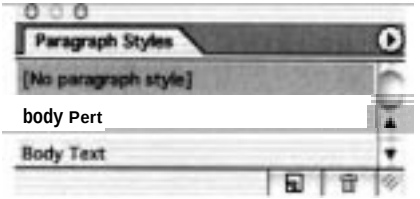
If you use keyboard shortcuts, keep them in groups. For instance, the styles for the list items all use the keypad number 2 with variations of the keyboard modifiers. So *list item plain* is Shift-2, while *list item body* is Shift-Cmd/Ctrl-2.

If you have defined styles in one document, you can transfer or load those styles into another document.

To transfer styles from an InDesign document:

1. Choose one of the following from the Styles palette menus in the document you want to import the styles into:
   - Load **Character** Styles transfers the character styles.
   - Load Paragraph Styles transfers the paragraph styles.
   - Load All Styles transfers both character and paragraph styles.
2. Navigate to find the document that contains the styles you want to import.
3. Click Open. The styles are automatically added to the current document.

TIP Style names are case sensitive. Therefore, a style name of ***Body Text*** will be added to a document that already has a style named ***body text*** 34.



34 ***Style names are case sensitive, so two styles can have the same name but different character cases.***

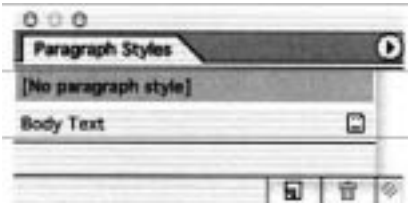
When you place text from word processing programs such as Microsoft Word into InDesign, the styles from the imported text are added to the document.

To import styles with placed text:

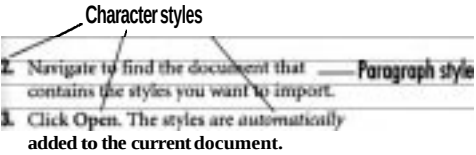
- Choose File >Place and navigate to find the text file.

TIP A disk icon indicates that the style definition came from the imported text 35.

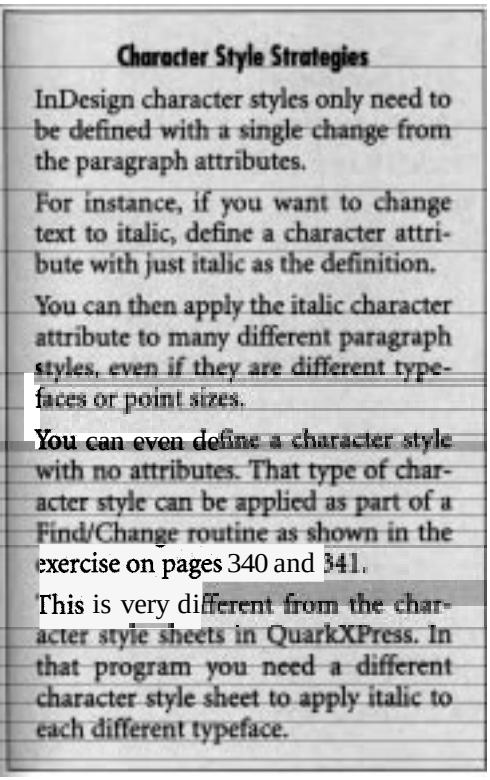
TIP The disk icon disappears if you modify the imported style.



35 ***The disk icon indicates that the style definition came from an imported text file.***



36 *An example ofparagraph and character styles applied to text.*



Applying Styles

Defining styles is just half of the process. You take advantage of your planning when you apply styles to text.

You can apply styles as you type new text, or you can add styles to existing text.

To apply paragraph styles:

1. Select the paragraphs.

TIP You do not need to select entire paragraphs. As long as a portion is selected, the paragraph style will be applied to the entire paragraph.

2. Click the name of the paragraph style.

   or

   Type the keyboard shortcut.

When you apply a paragraph style to text, the character attributes are controlled by the paragraph style. You can override the style by applying a character style **40**.

To apply character styles:

1. Select the text.

TIP You must select **all** the text you want to format with a character style.

2. Click the name of the character style.

   or

   Type the keyboard shortcut.

Overriding Styles

Once you have paragraph styles applied to text, you can override the style by applying local formatting to the text characters.

To override paragraph styles:

1. Select the text you want to modify.
2. Apply character attributes from the Character palette. A plus sign (+) next to the paragraph style name indicates that local character formatting has been applied to the text ㊲.

   or

   Apply a character style from the Character Styles palette.

When you apply a paragraph style, InDesign maintains any local character formatting that was applied to the text. However, you can override local character formatting when you apply a paragraph style.

To override local character formatting:

- Hold the Opt/Alt keys as you click the name of the paragraph style ㊳.

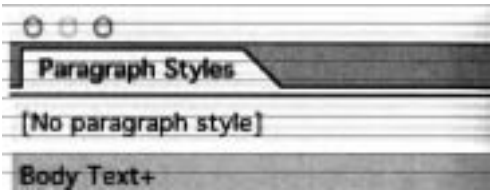
You use a different keystroke to override any character styles that have been applied to text.

TIP Use this keystroke when you have text placed from a word processing program that refuses to change when you apply paragraph styles.

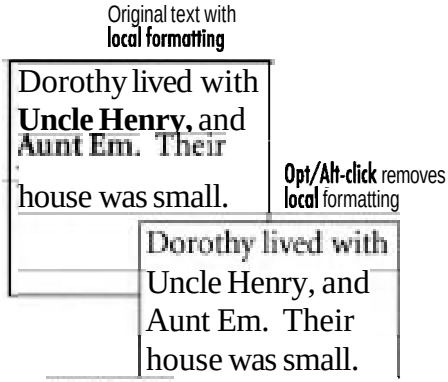
To override character styles:

- Hold the Opt/Alt + Shift keys as you click the name of the paragraph style. This deletes the character style from the text ㊴.

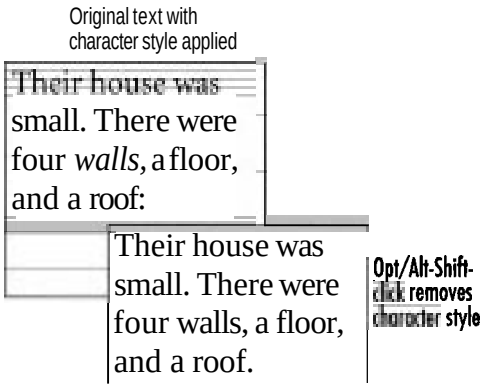
TIP Opt/Alt-Shift-click also removes any local formatting that has been applied to the paragraph.



㊲ *The plus sign next to the style name indicates that local formatting has been applied to the text.*

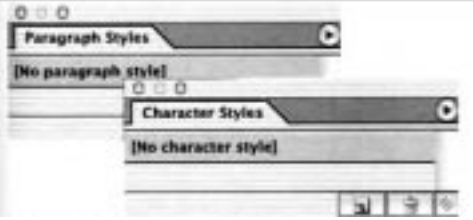


㊳ *Opt/Alt-click a paragraph style* ***name*** *to remove local character formatting applied to text.*



㊴ *Opt/Alt-Shift-click a paragraph style name to convert character styles to local formatting.*

40 *The* Paragraph Style Options dialog box *lets you change the style attributes.*



41 *The* [No paragraph style] *and* [No character style] *listings indicate that no style is applied to the text.*

Changing and Deleting Styles

One of the advantages of using paragraph or character styles is that when you redefine the style, it changes all the existing text that has that style applied to it.

To redefine a paragraph or character style:

1. Double-click the style name in the palette. This opens the Paragraph or Character Style Options dialog box, where you can change the attributes of the style 40.
2. Click OK. The style is redefined, and the text updates to reflect the new definition of the style.

To redefine a style by example:

1. Make any changes to a paragraph that has the style applied to it.
2. Select the modified text.
3. Choose Redefine Style from the Styles palette. The style is redefined based on the modified example.

You may have styles that you do not need in your InDesign document. You can shorten the styles list by deleting unused styles.

To delete styles:

1. Select the styles you want to delete.
2. Drag the styles onto the Delete Style icon.

   or

   Choose Delete Styles from the Style palette menu.

TIP If you delete a style that was applied to text, the appearance of the text does not change. The No Paragraph Style or No Character Style is applied to the text, but the text is no longer associated with any style 41.

TIP Use Select *All* Unused Styles to delete **all** the unused styles from a document.

Using Styles as Tags with Find/Change

This project shows how you can use Character Styles as marker tags as part in a Find/Change routine. In this case we want to change all the hyphens in between two numbers into proper en dashes (42). Since there are too many hyphens to do this manually, we need to automate the process.

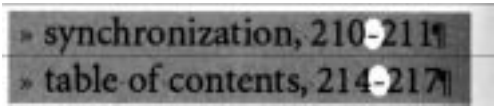
This is exactly the procedure I use when I get the index text files from my indexer. Instead of en dashes, he uses hyphens between the page ranges. So I need to change those hyphens to a proper en dash. (I've never wanted to correct him on this tiny typographic nuance since he does the best indexing I've ever seen.)

Our problem is that there may be hyphens between words that we don't want to change. So we need to search and replace only those hyphens that are between numbers.

The first thing we need to do is define a new character style, called *Tag for En Dash* (43). This character style consists of just a name; it has no attributes (44). This style will be used to simply tag or mark the hyphens that are between two numbers.

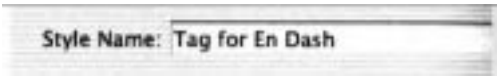
To make an entry in the Find what field, use the Special Characters menu to insert the code for the Any Digit wild card around a hyphen (45). This allows us to find "any number, hyphen, any number" or the code ^9-^9 (46).

I bet at this point you think we can just change the code in the Change to field to "any number-en dash-any number." Unfortunately we can't. You can only *search* for wild card characters; you can't *replace* with them. (*Damn!*) That's where our tag character style comes in.

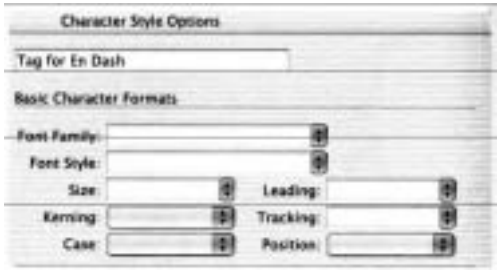


(42) *The* **ordinary hyphens between numbers** *need to be changed into en dashes.*

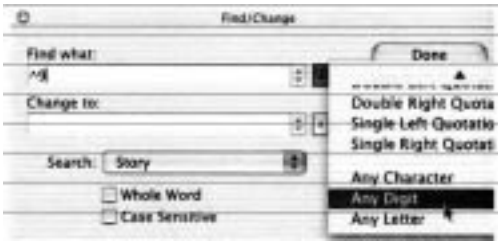
Character Style Options



(43) **A new character style** *called Tag for En Dash is created.*

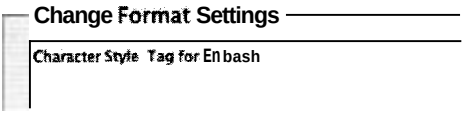


(44) **None of the character attributes are entered** *for this special tag style.*

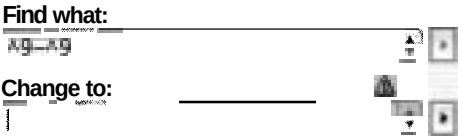


(45) *Use the Find what Special Characters menu to insert the* **Any Digit code.**

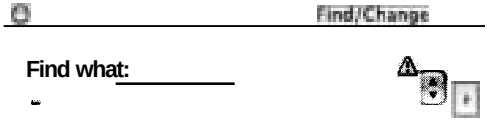
(46) *The code to find hyphens that are between two numbers.*



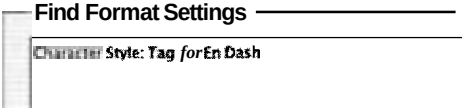
47 *The Tag for En Dash character style is applied to the Change Format Settings.*



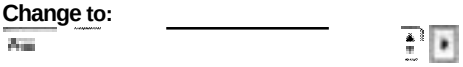
48 *The Find what and Change to fields set up to apply the Tag for En Dash style.*



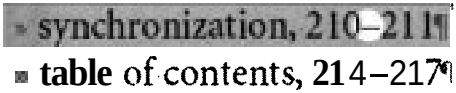
49 *The Find whatfield set to search for a hyphen. The alert symbol indicates that formatting has been applied.*



50 *The Find Format Settings set to search for hyphens with the character style tag applied.*



51 *The code for an en dash in the Change to field.*



52 *The* **en dashes** *replace the hyphens between the numbers.*

Leave the Change to field blank, but use the Formatting button in the Change area to apply the Tag for En Dash character style 47. This applies a marker to the numbers and the hyphen.

Once you have set up the Find/Change dialog box 48, you can click the Change All button. Nothing will appear to change in your document, but all the style markers will now be applied to the numbers and hyphens.

Now that all the hyphens that are between numbers are tagged—and we know that no other hyphens have that tag applied to them—it is rather easy to use the Find/Change dialog box to turn the hyphens into en dashes.

In the Find what field type a hyphen 49. Also use the Formatting button to add the Tag for En Dash character style 50. This means that InDesign will find only those hyphens that have the style marker applied to them—not any ordinary hyphens that may be in the text. You can also click the Change Formatting Clear button to remove the character style from the en dash.

Use the Change to field menu to insert the code for an en dash (^=) 51. If you're unsure of what you've done, use the Change/Find button to go slowly through your entire document. After one or two changes, I usually hit the Change All button, especially when I've got hundreds of entries in my index 52.

Of course, you may never need to change hyphens between numbers. Perhaps you want to delete the periods and reformat the decimals in a price such as *$4.99*. You can use the same technique to tag the period and numbers with a character style and then delete or reformat them as you want.

Automatic Drop Cap Styling

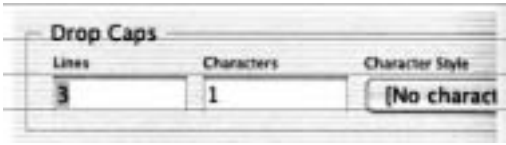
If you look at the opening paragraph of each chapter of this book, you'll notice that the typeface for the drop cap is not the same as the rest of the text in the paragraph. Now, I'm not complaining, but in early editions of this book, I had to manually drag across every single drop cap character and change it to a character style. However, InDesign now has a feature that makes it possible to automatically change the drop cap character to a character style.

TIP Use this technique if you need to apply an automatic drop cap to just one paragraph. Use the exercise on the next page if you need to apply the automatic drop cap to many paragraphs.

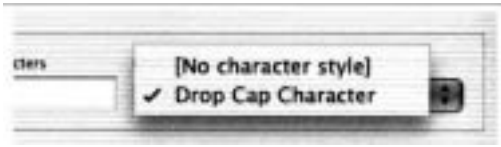
To apply automatic drop cap character styling:

1. Define a character style *(see page333)* that contains the formatting for the drop cap character.
2. Place your insertion point inside the paragraph that you want to style with the drop cap.
3. Choose Drop Caps and Nested Styles from the Paragraph palette menu. The Drop Caps and Nested Styles dialog box appears 53.
4. Use the Lines field to set the number of lines that the drop cap character will descend into the text 54.
5. Use the Characters field to set the number of characters that will be turned into a drop cap character 54.
6. Use the Character Style menu to choose the predefined character style to assign to the drop cap character 55.
7. Click OK. The drop cap with the character style is applied to the selected paragraph.

53 ***The*** Drop Caps and Nested Styles dialog **box** ***allows you to automate the style applied to drop caps.***

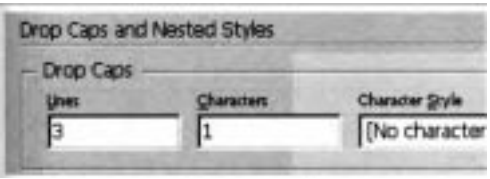


54 ***Set the*** Lines and Character fields ***to the number of lines for the drop cap and the number of characters to be formatted.***



55 ***Use the*** Character Style menu ***to assign a character style to format the drop cap character.***

56 ***The*** Drop Caps and Nested Styles category ***for paragraph styles allows you to automate drop cap characters as you apply a paragraph style.***



57 ***The controls for automatic*** Drop Caps within the Paragraph Style dialog box.

The previous exercise works great if you have only one drop cap paragraph you need to style. But if you're working with many paragraphs that need to be formatted, you're much better off making the automatic drop cap part of a paragraph style sheet. That way you can style all the text with a single, magical click.

To apply automatic drop cap in a paragraph style:

1. Define a character style ***(see page*** 333) that contains the formatting for the drop cap character.
2. Choose to define a new paragraph style ***(see page*** 328).
3. Choose the Drop Caps and Nested Styles category from the paragraph styles dialog box **56**. The Drop Caps controls appear **57**.
4. Set the Lines field as described on the previous page.
5. Set the Characters field as described on the previous page **50**.
6. Set the Character Style menu as described on the previous page **50**.
7. Set whatever other formatting you want in the Paragraph Styles dialog box **55**.
8. Click OK to define the paragraph style.
9. Use the Paragraph Styles palette to assign this paragraph style to text. This allows you to assign the automatic drop cap to make paragraphs.

Using Nested Styles

Every once in a while I see a feature that is revolutionary in the field of desktop publishing. Nexted styles is such a feature. Nested styles allows you to automate how character styles are applied to paragraphs.

Understanding how Nested Styles work

Consider if you were formatting a phone directory. Each paragraph starts with a person's name followed by a colon. After that comes a phone number, and then a new line symbol forces the rest of the address to the end of the paragraph. These are repeating elements that you can reliably count on to use as markers for formatting using nested styles.

You want the person's name to be italic, the phone number to be bold, and the text after the new line symbol to be the regular paragraph style.

Before Nested Styles, you would have to manually highlight each element in the paragraph and apply a character style. With Nested Styles all the formatting is applied in one fell swoop (58)!

TIP As you work with Nested Styles, remember that you need predictable elements that you can use as part of the automatic formatting. If you can't predict where the elements will be in the text, you probably can't use Nested Styles for that text.

To prepare to use Nested Styles:

- Define all the Character Styles that will be used to apply the formatting for Nested Styles.

TIP You can only use Character Styles as part of Nested Styles, not formatting from the Character palette.

Dorothy Gale: (620) 555-5432¬
3 Farmhouse Lane, Very Small Town, KA, 12345¶
Scarecrow: (620) 555-5432¬
Middle of Cornfield, Very Small Town, KA, 12345¶
Woodman: (620) 555-5432¬
Deep in Forest, Very Small Town, KA, 12345¶

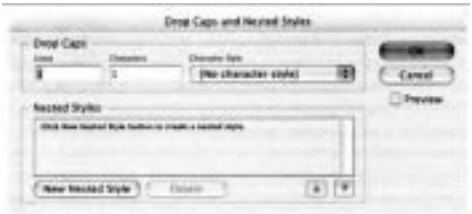
(58) ***An example of the kind of formatting that can be automated using Nested Styles. In this case there are predictable elements that can be used to apply the automatic formatting.***

Searching for Repeating Elements

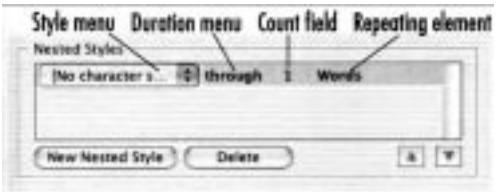
It may seem difficult to find repeating elements, but they are much easier to find than you might think.

Consider the steps in my exercises. The numbers are always separated from the rest of the body copy by a tab character. So I can easily set the tab as the repeating element for a nested style.

If you are formatting any text that comes from databases, it is extremely easy to have the people who create the database add tab characters to divide the different parts of the text. Then you can use the repeating tab characters to format with the nested styles.



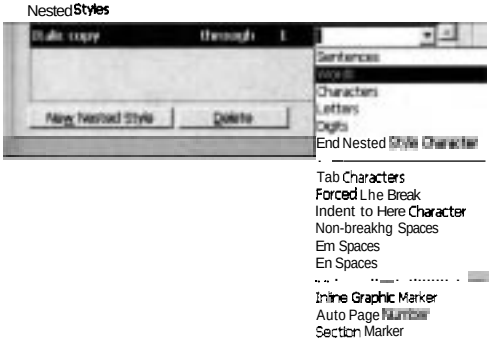
59 *The Nested Styles area of the* Drop Caps and Nested Styles dialog box *allows you to apply multiple character styles to predictably occurring text elements.*



60 *The* New Nested Style button *creates a new listing in the Nested Styles area.*

61 *Click the* Character Style menu *to choose the character style that should be applied as the formatting for the nested style.*

62 *Click the* Duration menu *to set the extent of where the formatting is applied.*



63 *Click the* Repeating Element menu *to choose the element that ends the nested style.*

Once you have defined the character styles, you can apply them using the Nested Styles command.

To apply the Nested Styles command to text:

1. Place your insertion point inside the paragraph that you want to format.
2. Choose Drop Caps and Nested Styles from the Paragraph palette menu. The Drop Caps and Nested Styles dialog box appears 59.
3. Click the New Nested Style button. This adds a new listing under the Nested Style area 60.
4. Use the Character Style Menu to choose which character style will be applied to the repetitive element 61.
5. Use the Duration menu to choose the extent of how the Character Style is applied as follows 62:
   - Through applies the style including the repeating character.
   - Up to applies the style so it ends before the repeating character.
6. Use the Count field to set how many repeating characters should occur before the character style ends.
7. Use the Repeating Element menu to set which element controls the nested style 63. *(See the next exercise for how to set the Repeating Elements.)*
8. Click OK to apply the nested style.

   or

   Click the New Nested Style button to add more nested styles for other parts of the text.

To set the repeating elements in a nested style:

- Click the Repeating Element menu and choose one of the listings from the menu.

  or

  Type a single character in the field.

TIP A character typed into the field can be text, punctuation, or numbers. You cannot type words into the field.

There may be times that you don't have any repeating element that you can rely on to appear in the text. In that case you can insert the End Nested Style Character to control the end of a nested style.

To manually insert the End Nested Style Character:

1. Place your insertion point where you want the End Nested Style Character to appear.
2. Choose Type >Insert Special Character > End Nested Style Here. This inserts the End Nested Style Here character into the text 64.

TIP The End Nested Style Here character can be seen if you choose Type >Show Hidden Characters.

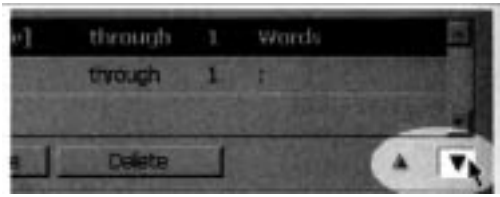
TIP You can also use the Special Menu in the Change field to insert the End Nested Style Here character into text.

If you have multiple nested styles in the Nested Styles area, you can move them up or down so they change the order that they are applied.

To change the order of multiple nested styles:

1. Select the nested style that you want to move.
2. Click the up or down arrows to move the nested style to a new position 65.

64 *The* End Nested Style Here character *can be inserted to end the effects of a nested style.*



65 *Use the* up/down arrows *to change the order of nested styles.*

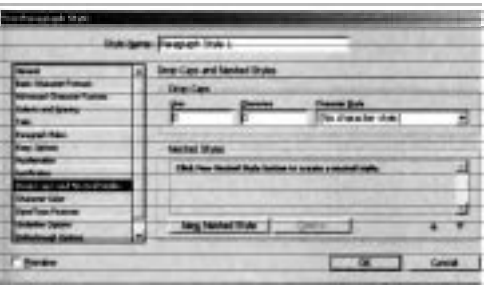
Using the End Nested Style Here Character

When might you need to insert the End Nested Style Here character? Consider if you want to style the last set of information in an address such as a zip code or postal code,

You can't rely on a certain number of commas appearing before the zip code appears, nor can you rely on the code to only have numbers if you have a mixture of US and European addresses.

That's when you want to insert the End Nested Style Here character in front of the code.

If necessary, you can work with the editorial department that generates the text to insert a special character before the code. For instance, the zip code 10003 might appear as CODE10003. You can then use the Find/Change command to change the word CODE into the End Nested Style Here character.



The Drop Caps and Nested Styles category ***for paragraph styles lets you define nested styles to automate the formatting for repeating elements.***

The Drop Caps and Nested Styles command in the Paragraph palette can be used on just the selected text. However, it is rather easy to create a paragraph style that contains the nested style. This makes it possible to apply nested styles by simply applying a paragraph style to the text.

To apply nested styles in a paragraph style:

1. Define the character styles ***(seepage* 333)** for the nested style.
2. Choose to define a new paragraph style ***(see page* 328).**
3. Choose the Drop Caps and Nested Styles category from the paragraph styles dialog box 85.
4. Add and define the nested styles as described on page 344.
5. Add any additional nested styles as necessary.
6. Set whatever other formatting you want in the Paragraph Styles dialog box.
7. Click **OK** to define the paragraph style.
8. Use the Paragraph Styles palette to assign this paragraph style to text.

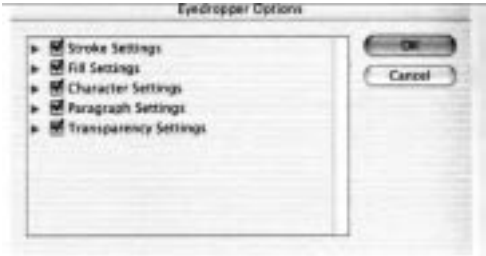
Using the Eyedropper on Text

Paragraph and character styles are the most efficient ways to apply and change text formatting for long documents. However, the Eyedropper tool lets you quickly grab the formatting from one part of the text and apply it to another. *(See Chapter 5 and Chapter 6 for more information on how to use the eyedropper to sample colors, fills, and stroke attributes.)*

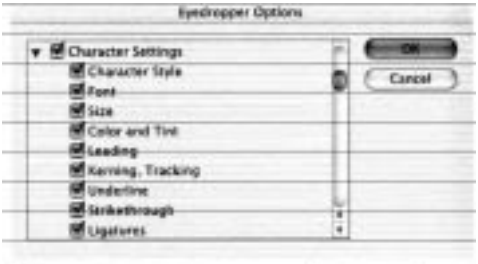
To set the eyedropper options for text:

1. Double-click the Eyedropper tool in the Toolbox (67). This opens the Eyedropper Options dialog box.
2. Click the triangle control to open the Paragraph Settings from the list (68).
3. Check which paragraph attributes you want the Eyedropper tool to sample.
4. Click the triangle control to open the Character Settings from the list (69).
5. Check which character attributes you want the Eyedropper tool to sample.

(67) *The* Eyedropper tool *in the Toolbox lets you sample and apply text formatting.*



(68) *The* Eyedropper Options dialog box *contains the controls for text as well as object styling.*



(69) *Use the checkboxes to set the Paragraph Settings or the* Character Settings.

70 *Click the white eyedropper to sample the right alignment of the paragraph attributes.*

71 *Click the black eyedropper to apply the right alignment of the paragraph attributes.*

72 *Click the white eyedropper to sample local character attributes.*

73 *Drag the black eyedropper to apply character attributes to text.*

Once you have set the eyedropper options, you can sample and apply paragraph or character attributes.

TIP Deselect the text frame as you use the Eyedropper tool to avoid styling the text frame itself.

To sample and apply paragraph attributes:

1. Choose the Eyedropper tool.
2. Click the white eyedropper inside the paragraph that you want to sample **70**. The eyedropper changes from white to black.
3. Click the black eyedropper inside the paragraph that you want to change **71**. This changes the paragraph attributes.

TIP The black eyedropper does not apply character attributes when clicked unless a paragraph style was already applied to the sampled text.

4. Click the eyedropper inside any additional paragraphs that you want to change.

To sample and apply character attributes:

1. Choose the Eyedropper tool.
2. Click the white eyedropper inside the text that you want to sample **72**. The eyedropper changes from white to black.
3. Drag the black eyedropper across the exact text you want to change. This highlights the text **73**.
4. Release the mouse to apply the changes.

To sample new text attributes:

1. Hold the Opt/Alt key. The eyedropper changes to white.
2. Click the eyedropper inside the new text that you want to sample.

Creating Tagged Text

If you import text from Microsoft Word, InDesign reads the paragraph and character styles applied in Word. However, what happens if you want to import text from an application such as a database that doesn't have style sheets? Tags let you add the codes for styles ⓮ so that the correct formatting imports with the text ⓯.

You can learn the correct tags for different formatting by exporting tags from InDesign.

To export tags from InDesign:

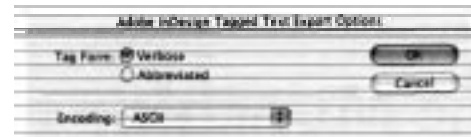
1. Select the text you want to export.
2. Choose File > Export.
3. Choose InDesign Tagged Text from the Save as File Type (Win) or Formats (Mac) menu.
4. Click Save. The Export Options dialog box appears ⓰.
5. Choose the type of tag:
   - Verbose shows the longer version of the tags.
   - Abbreviated shows the short version of the tags.
6. Choose the type of encoding ⓱:
   - ASCII, for most English language files.
   - ANSI, for most international characters.
   - Unicode, a standard for most languages.
   - Shift-JIS, for Japanese characters.


```
<ASCII-MAC>
<dps:Normal=<Nextstyle:Normal><ct:>>
<ctable:=<Black:COLOR:CMYK:Process:0.0000
00,0.000000,0.000000,1.000000>>
<pstyle:Normal>The <ct:Bold>Scarecrow<ct:>
did not mind how long it took him to fill the
basket, tor it enabled him to <ct:Italic>keep
away from the fire.<ct:> So he kept a good
distance away from the flames.
```

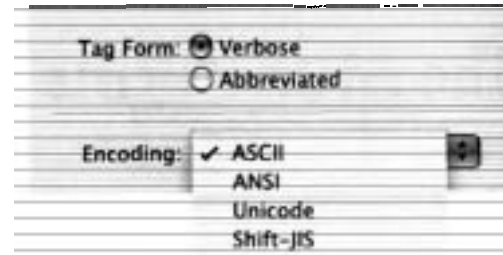
⓮ *The* tagged text codes *as they appear outside InDesign.*

The Scarecrow did not mind how long it took him to fill the basket, for it enabled him to *keep away from the fire*. So he kept a good distance away from the flames.

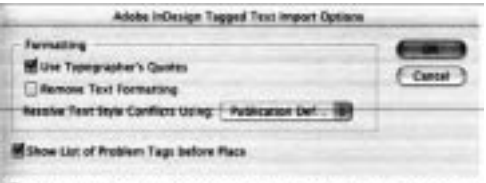
⓯ *The same text as it appears on the InDesign page.*



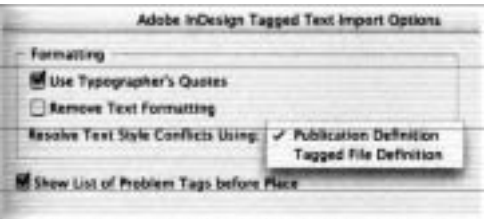
⓰ *The* Export Options dialog box *for setting the Tagged Text options.*



⓱ *The* Encoding menu *for how tagged text should be exported.*



78 *The* **InDesign Tags Import Options dialog box** *is used to control how tagged text is imported.*



79 *The* **Resolve Text Style Conflicts Using** menu *for how two conflicting styles should be resolved.*

You can import tagged text as ordinary text. However, there are some special import options for tagged text.

To import tagged text:

1. Choose File > **Place.**
2. Navigate to find the text-only file with the tagged text codes.
3. If you want to control how the text is placed, click Show Import Options.
4. Click Open. The Adobe InDesign Tagged Text Import Options dialog box appears **78**.

The tagged-text import options control how any conflicts and missing tags are treated **79**.

To set tagged-text import options:

1. Check Use Typographer's Quotes to import text with the proper smart quotes.
2. Check Remove Text Formatting to import the text without any local formatting applied.
3. Select a choice for resolving conflicts between the styles in the InDesign Tags Import Options dialog box:
   - Publication Definition uses the style as it is already defined in the document.
   - Tagged File Definition uses the style as defined in the tagged text. This adds a new style to the document with the word "copy" added to the style name.
4. Check Show List of Problem Tags before Place to display a list of incorrect or unrecognized tags.

Using Find Font

In addition to the **Find/Change** commands for text, **InDesign** lets you make global changes for font families. This helps if you open documents that contain missing fonts.

TIP The Find Font list lets you quickly check which fonts are used in a document.

To make changes using Find Font:

1. Choose Type >Find Font. The Find Font dialog box appears (80).
2. Select the font in the list that you want to change.

TIP The icons next to each font display the type of font and its status (81).

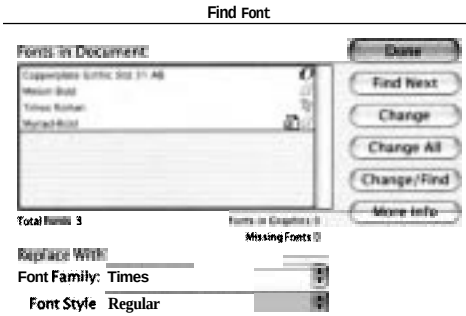
3. Use the Replace With list to choose a replacement for the selected font.
4. Click Find First to find the first instance of the font. **InDesign** highlights the first place the font is used.

TIP When you find the first instance, the Find First button changes to Find Next.

5. Click one of the following options:
   - Find Next skips that instance.
   - Change replaces that instance.
   - **Change/Find** replaces that instance and finds the next instance.
   - Change ***All*** changes **all** the instances of the font.
6. Use the More Info button to find more information, such as if the fonts can be embedded in PDF documents (82).
7. Click Done to return to the document.

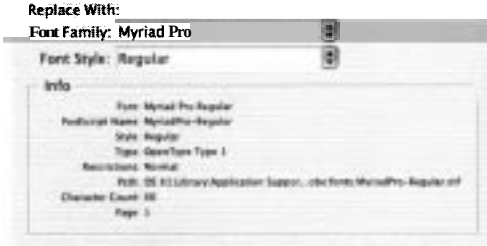
To replace missing fonts:

1. Open the document. If fonts are missing, an alert box appears.
2. Click Find Font to open the Find Font dialog box.
3. Choose the missing font and follow the steps in the previous exercise.

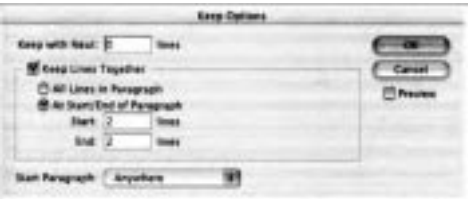


80 *The* **Find Font dialog box** *lets you make global changes to the fonts in a document.*

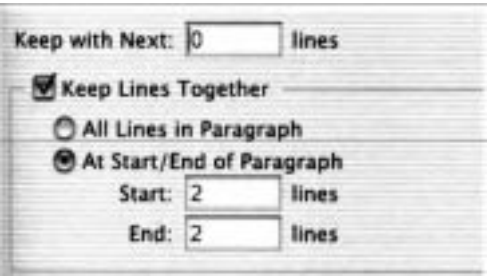
81 *The* **Find Font icons** *tell you the status and type of fonts used in the document.*



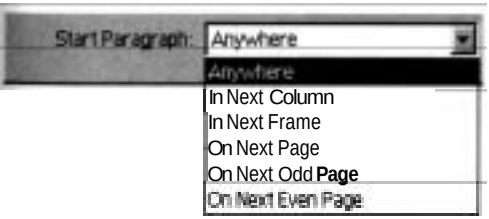
82 *The* **Info area** *of the Find Font dialog box gives you more information about the font.*



83 *The* Keep Options dialog box *controls how paragraphs break across columns orpages.*



84 *The* Keep Lines Together controls *of the Keep Options dialog box.*



85 *The* Start Paragraph list *lets you choose where the next lines of the paragraph appear.*

Keeping Lines Together

Another automation technique is to specify how many lines of text must remain together in a column or page. InDesign does this using the Keep Options controls.

To set the keep options for a paragraph:

1. Choose Keep Options from the Paragraph palette menu. This opens the Keep Options dialog box **83**.
2. Enter a number in the Keep With Next Lines field to force the last line in a paragraph to stay in the same column or page with the specified number of lines.

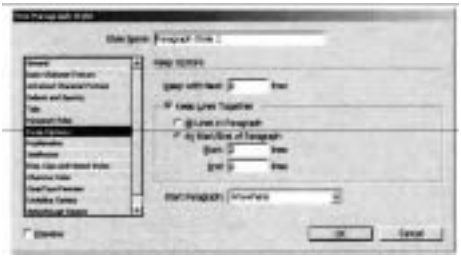
TIP This option ensures that subheads or titles remain in the same column as the body copy that follows.

3. Click Keep Lines Together and set one of these options **84**:
   - *All* Lines in Paragraph prevents the paragraph from ever breaking.
   - At **Start/End** of Paragraph lets you set the number of lines that must remain together for the start and the end of the paragraph.
4. Use the Start Paragraph menu to choose where the lines must jump to **85**.
   - Anywhere allows the text to jump anywhere.
   - In Next Column forces the text to the next column or page.
   - In Next Frame forces the text to the next frame or page.
   - On Next Page forces the text to the next page.
   - On Next Odd Page forces the text to the next odd-numbered page.
   - On Next Even Page forces the text to the next even-numbered page.

You can also apply the Keep Options as part of a paragraph style.

To set the keep options in a paragraph style:

1. Choose to define a new paragraph style *(see page* 328).
2. Choose Keep Options category from the paragraph styles dialog box 86.
3. Set the controls as described in the previous exercise.
4. Set whatever other formatting you want in the Paragraph Styles dialog box.
5. Click OK to define the paragraph style.
6. Use the Paragraph Styles palette to assign this paragraph style to text.



86 *The* Keep Options category *of the New Paragraph Style dialog box.*

Using Scripts

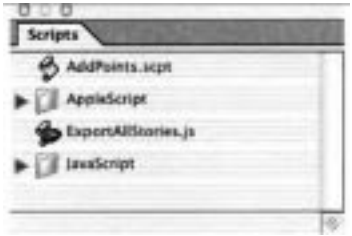
Perhaps the most powerful way to automate working in InDesign is with AppleScripts on the Macintosh or VisualBasic scripts on Windows. It's very easy to run scripts in InDesign. (Honestly, if I can do it, anyone can!)

To run scripts in InDesign:

1. Place the script file or the folder containing the script file inside the following directory path:

   InDesign Application Folder: Presets: Scripts.
2. Choose Windows >Scripting >Scripts to open the Scripts palette 87.
3. If you have placed a folder inside the Scripts directory, click the triangle controller to open the scripts in the folder.
4. Double-click the script that appears in the palette.

TIP Certain scripts require an object or text to be selected. Follow any onscreen prompts that occur.



87 *Use the* Scripts palette *to run scripts from within InDesign.*

My Favorite Script

Although covered here in a chapter on automating text, scripts can automate working with text, objects, images, or interacting with other programs. My favorite script is one that was written for me by Peter Truskier of Premedia Systems. This script automates the process of creating the special spotlight used on certain screen shots in this book. (See figure 45 for an example of the effect.)

With Peter's marvelous script, I can do in just a single click that which used to take me almost a minute for each illustration. Ordinarily, it costs big bucks to hire people to write scripts for you, but if you go to the Adobe Studio Exchange, (www.adobestudioexchange.com) you will find other similarly wonderful scripts that are free to download.

InDesign ships with a set of scripts that you can use to automate a variety of tasks. You can also use these scripts as examples of how to write scripts for various tasks. Here is a list of the scripts that ship with InDesign.

Script Name	Action
AddGuides	Adds guides around the selected object or objects.
AddPoints	Adds points to the paths of an object or objects.
CreateCharacterStyle	Defines a complete character style based on the selected text.
CropMarks	Adds crop and/or registration marks around the selected object or objects.
ExportAllStories	Exports all of the stories in a document to a series of text files.
Neon	Applies a "blend" effect to the selected object or objects.
PathEffects	Changes the position of path points on the selected object or objects to add a creative effect.
RandomFill	Fills the selected object or objects with random objects.
SelectObjects	Selects objects on the active spread by their object type.
SortParagraphs	Sorts the paragraphs in the selection alphabetically.
StepAndRepeat	Duplicates objects and changes object positions/sizes/ colors.
TabUtilities	Applies tab stops and indents to the selected text.
TextCleanup	Performs a series of common text find/change operations. Uses a separate text file that lets you customize the find/change operations.
DebugOn	Turns on the JavaScript debugger for the current InDesign session (JavaScript only).
DebugOff	Turns off the JavaScript debugger (JavaScript only).

Of course, if you are very ambitious, you might want to try your hand at writing your own scripts for InDesign. Consult the Scripting Guide that is in the Technical folder on your InDesign CD-ROM.

Scripting requirements (Mac):

To write scripts on the Macintosh, you must have AppleScript version 1.6 or higher, and an AppleScript editor. Apple's Script Editor is included with the Mac OS. There are also third-party script editors, such as Scripter (from Main Event Software) or Script Debugger (from Late Night Software).

Scripting requirements (Win):

To use InDesign scripting in Windows, you need one of the following: Visual Basic 5 Control Creation Edition (CCE), Visual Basic 6, Visual Basic .NET, VBScript, or an application that contains Visual Basic for Applications (VBA). These include Microsoft Office, Visio, AutoCAD.

TYPOGRAPHY CONTROLS 15

The one thing that truly separates the amateurs from the experts in page layout is the control they take over their text. Amateurs are pleased if they can apply simple formatting such as fonts, sizes, alignment, tracking, and so on.

Experts, though, want more from a page-layout program. They want sophisticated control over kerning. This includes the ability to move one character in so that it tucks under the stroke of another.

They want to control how lines are justified within a text frame. This means that if one line looks too crowded and the next has big gaps between the words, the experts tell the program to reapportion the spaces.

The experts also want to work with the newest typefaces that give more choices for how letters look and act together.

These are advanced text effects. Once you apply these features, you move from being an ordinary designer to a typographer.

Optical Margin Alignment

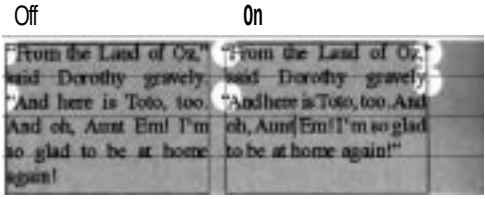
One of the most sophisticated text effects in InDesign is the ability to apply hanging punctuation to justified text in which a slight adjustment of the margin creates a more uniform appearance for the edge of the text. Hanging punctuation is applied by setting the *optical margin alignment*. This moves punctuation characters slightly outside the text margin ❶. In addition, optical margin alignment also moves the serifs of letters outside the margin ❷.

Optical margin alignment is set using the Story palette.

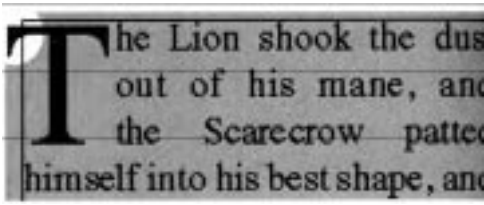
To set optical margin adjustment:

1. Select the text.
2. Choose **Type** >Story. This opens the Story palette ❸.
3. Check Optical Margin Alignment. The text **reflows** so that the punctuation and serifs lie outside the margin edges.
4. Enter a size for the amount of overhang.

TIP As a general rule, set the overhang the same size as the text.

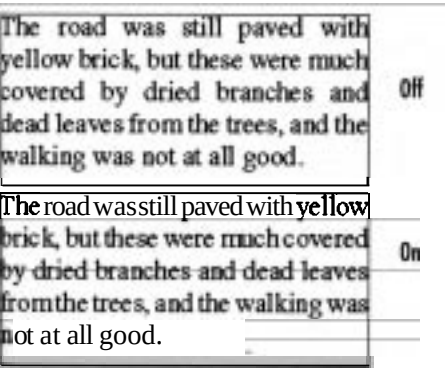


❶ *To create the effect of a straight edge,* optical margin alignment *moves punctuation outside the margin edges.*



❷ *The* Optical Margin Alignment *also moves the serifs of letters slightly outside the margin.*

❸ *The* Story palette *lets you set the Optical Margin Alignment to hang punctuation in the margin.*



❹ ***Turn on*** Adobe Paragraph Composer ***to improve the spacing between words.***

When to Use Paragraph Composition?

Why would anyone want to turn off the miracle of paragraph composition? Well there are times when the paragraph composer insists on breaking a paragraph where you don't want it to break. If that happens, you can turn off the paragraph composer.

You may also want to turn off the Paragraph Composer if you have converted a QuarkXPress document into InDesign and you want to try to keep the text from reflowing.

Also, some statistical data may be easier to work with if you turn off the paragraph composer.

Using Adobe Paragraph Composer

InDesign has two ways of composing (laying out) text. Single-line composition looks at the current line and evaluates the best place to break the line or apply hyphenation. Paragraph composition looks at the **all** the text in a paragraph—forward and backward—when it evaluates the best place to break lines. When paragraph composition is turned on, the result is more even spacing for the text and fewer hyphens ❹.

To apply paragraph composition:

1. Select the text.
2. Choose Type > Paragraph to open the Paragraph palette.
3. Choose Adobe Paragraph Composer from the Paragraph palette menu. The text reflows.

TIP Adobe Paragraph Composer is a paragraph attribute and is applied to **all** the text in a paragraph.

TIP Adobe Paragraph Composer is turned on by default when you first open InDesign.

TIP Choose Adobe Single-line Composer to apply standard line-by-line composition.

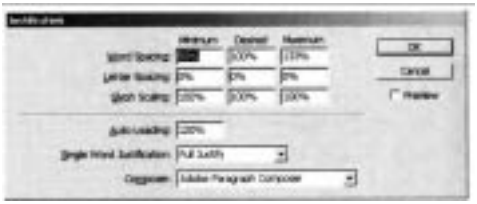
Applying Justification Controls

Justificationdetermines how lines fit between margins. *(See the sidebar below for information on how justification affects text.)* InDesign provides three different ways to control justification: word spacing, letter spacing, and glyph spacing. *Word spacing* changes the space between words.

To set word spacing:

1. Select the text.
2. Choose Type >Paragraph to open the Paragraph palette.
3. Choose Justificationfrom the Paragraph palette menu. This opens the Justification dialog box ❺.
4. Set the Word Spacing options as follows ❻:
   - **Desired** controls the preferred amount of space between words. 100% indicates that you want the same amount that the designer of the typeface created.
   - **Minimum** controls the smallest amount of space you want between words. For instance, a value of 80% means that you are willing to allow the space to be 80% of the normal space.
   - Maximum controls the largest amount of space you want between words. A value of 120% means that you are willing to allow the space to be 120% of the normal space.
5. Click OK to apply the changes ❼.

TIP The Minimum, Desired, and Maximum settings apply only to text that is set to one of the Justified settings. Other alignments, such as left-aligned text, use only the Desired setting.



❺ *The* Justification dialog box *controls word and letter spacing.*

	Minimum	Desired	Maximum
Word Spacing:	80%	100%	133%
Letter Spacing:	0%	0%	0%
Glyph Scaling:	100%	100%	100%

❻ *The* spacing controls *in the Justification dialog box.*

Welcome, my child, to the Land of **Oz**

Min: 80, Desired: 100, Max: 120

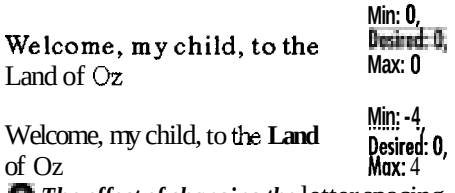
Welcome, my child, to the **Land of** Oz

Min: 80, Desired: 100, Max: 100

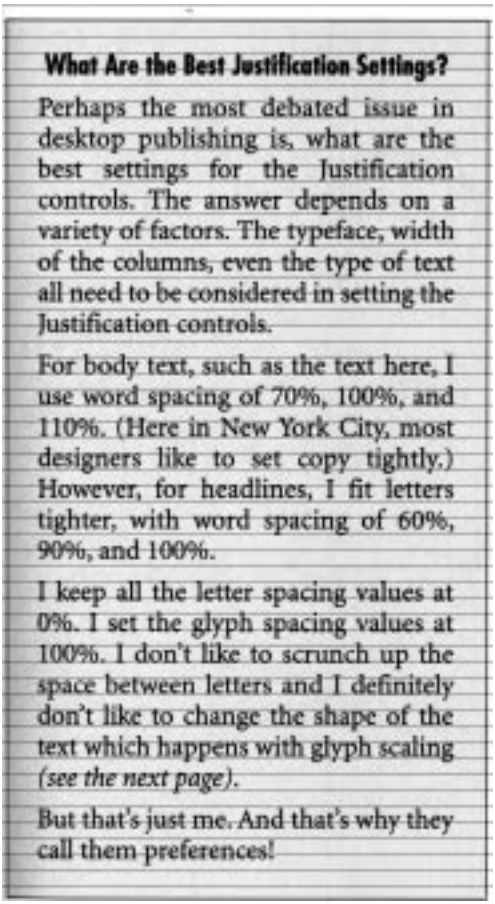
❼ *The effect of changing the* word spacing. *Notice the change in the amount of space between the words.*

Understanding Justification

The lines in this paragraph are justified—that is, both ends of the line are aligned with the paragraph margins. Not all the words can fit evenly between the margins, so some sentences have a bit more space between the words and others have less. The justification settings control how much space is added tc make the lines fit between the margins.



1 ***The effect of changing the*** letter spacing. ***Notice how there is less space between the characters within the words.***



What Are the Best Justification Settings?

Perhaps the most debated issue in desktop publishing is, what are the best settings for the Justification controls. The answer depends on a variety of factors. The typeface, width of the columns, even the type of text all need to be considered in setting the Justification controls.

For body text, such as the text here, I use word spacing of 70%, 100%, and 110%. (Here in New York City, most designers like to set copy tightly.) However, for headlines, I fit letters tighter, with word spacing of 60%, 90%, and 100%.

I keep all the letter spacing values at 0%. I set the glyph spacing values at 100%. I don't like to scrunch up the space between letters and I definitely don't like to change the shape of the text which happens with glyph scaling *(see the next page)*.

But that's just me. And that's why they call them preferences!

The space between letters is ***letter spacing,*** sometimes called character spacing. InDesign lets you change the letter spacing for text whether justified or not.

To set letter spacing:

1. Select the text.
2. Choose **Type** >Paragraph to open the Paragraph palette.
3. Choose Justificationfrom the Paragraph palette menu.
4. Set the Letter Spacing options as follows:
   - **Desired** controls the preferred amount of space between letters. 0% indicates that you do not want to add or subtract any space.
   - Minimum controls the smallest amount of space between letters. **A** value of **–5%** allows the space to be reduced by ***5%*** of the normal space.
   - **Maximum** controls the largest amount of space between letters. ***A*** value of ***5%*** allows the space to be increased by ***5%*** of the normal space.
5. Click OK to apply the changes **1**.

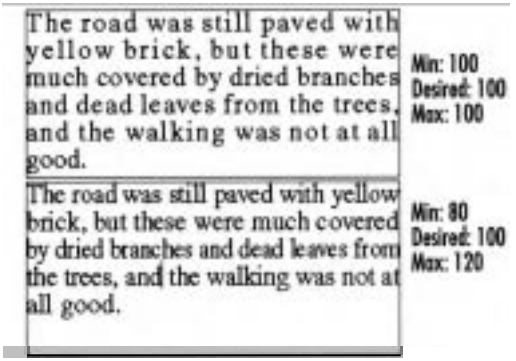
TIP If a paragraph cannot be set according to the justification controls you choose, InDesign violates the settings by adding or subtracting spaces. Set the Composition preferences to have those violations highlighted ***(see page*** 490).

Another way to control justification is to use ***glyph scaling. (Glyph*** is the proper term for all the letters, numbers, punctuation marks, and other parts of text. ***See the sidebar on page 361 for more information on glyphs.)*** Glyph scaling applies horizontal scaling to the letters themselves so that the text takes up more or less space within the line.

To set glyph scaling:

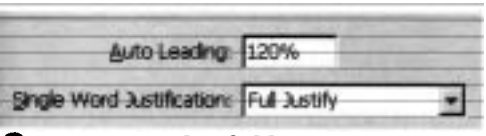
1. Select the text.
2. Choose **Type** >Paragraph to open the Paragraph palette.
3. Choose Justificationfrom the Paragraph palette menu.
4. Set the Glyph Scaling options as follows:
   - **Desired** controls the preferred amount of scaling. **100%** indicates that you do not want to apply any scaling to the character shape.
   - **Minimum** controls the smallest amount of scaling that you are willing to apply to the text. **A** value of 98% means that you are willing to allow the characters to be reduced by **2%** of their normal width.
   - **Maximum** controls the amount that you are willing to expand the space between words. **A** value of **105%** means that you are willing to allow the characters to be increased by **5%** of their normal width.
5. Click OK to apply the changes ❾.

TIP Glyph scaling distorts the shape of letters. Most people say you can't see the slight distortion. However, typographic purists (such as this author) try to avoid distorting the letterforms whenever possible ❿.



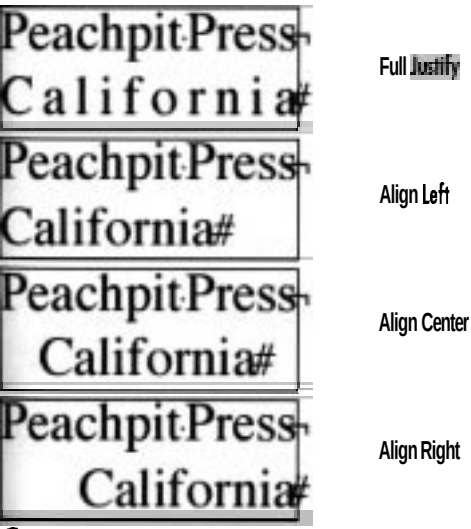
❾ ***The effects of changing the*** **glyph scaling.**

❿ ***The black area shows the original shape of the character. The gray area shows the effects of 80% glyph scaling.***



⓫ *The* **Auto Leading field** *controls how InDesign calculates the leading when set to Auto.*

⓬ *The* **Single Word Justification menu** *controls what happens when a single word occupies a line of justified text.*



⓭ *The effects of the* **Single Word Justification settings.**

The Auto Leading field controls how much space is put between the lines whenever auto leading is chosen *(see page* 57*)*.

To set the Auto Leading percentage:

1. Choose Justification from the Paragraph palette menu.
2. Enter an amount in the Auto Leading field ⓫.

TIP The Auto Leading percentage is based on the point size of the text. So an Auto Leading of 120% applied to 12-point text creates a leading of 14.4 points (12 × 1.20 = 14.4).

TIP Most professional designers use an absolute amount for leading by entering a specific number, rather than relying on the automatic leading.

Applying Justification Controls

Have you ever seen a paragraph of justified text where a single word stretched out along the entire line? InDesign lets you control what happens to a single word in a justified paragraph.

To set the single word justification:

1. Choose Justification from the Paragraph palette menu.
2. Choose a setting from the Single Word Justification menu ⓬. Any text that is set to Justify in the Paragraph palette will be set according to the menu command ⓭.

Controlling Hyphenation

InDesign lets you turn on hyphenation in the Paragraph palette. Once hyphenation is turned on, you can then control how the hyphenation is applied. *(See the sidebar on the opposite page for comments on setting the hyphenation controls.)*

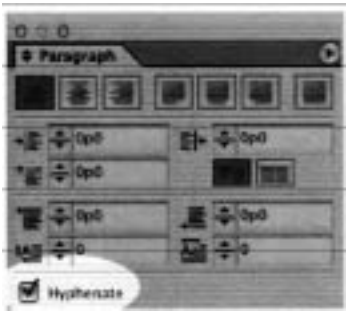
To turn on hyphenation:

1. Select the text.
2. Check Hyphenate in the Paragraph palette ⓮.

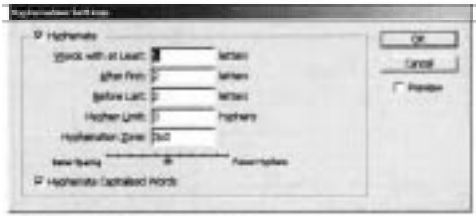
TIP The Hyphenate check box is also controlled from within the Hyphenation dialog box *(see the next exercise)*.

To control the hyphenation:

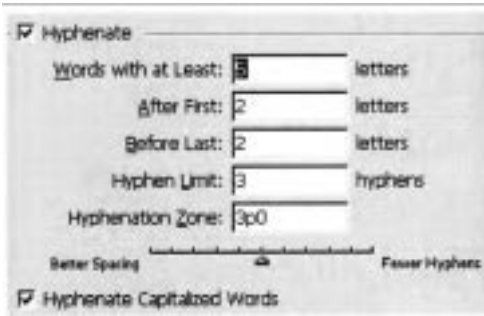
1. Choose Hyphenation from the Paragraph palette menu. The Hyphenation Settings dialog box appears ⓯. The Hyphenate check box displays the controls ⓰.
2. Words with at Least controls the minimum number of letters a word must contain before it can be hyphenated.
3. After First sets the minimum number of letters that must appear before the hyphen.
4. Before Last sets the minimum number of letters that must appear after the hyphen.
5. Hyphen Limit sets how many consecutive lines can end with hyphens.
6. Hyphenation Zone controls the amount of whitespace at the end of a non-justified line. This option only affects Single-Line Composer text.
7. Hyphenate Capitalized Words allows those words to be hyphenated.
8. Adjust the hyphenation slider to control the total number of hyphens in the paragraph.



⓮ *Click the* Hyphenate check box *to turn on automatic hyphenation for aparagraph.*



⓯ *The* Hyphenation Settings dialog box *lets you control how hyphenation is applied.*



⓰ *The Hyphenation controls let you enter values for how words are hyphenated.*

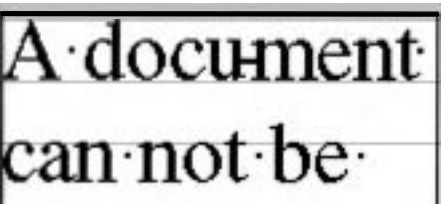
Hyphenation Units are Nigels

The units in the hyphenation slider are called Nigels in-honor of Nigel Tufnel (Christopher Guest), the "Spinal Tap" guitarist, whose amplifier went to 11.

Behold! I am the great and mighty, all-powerful Oz.

Behold! I am the great and mighty, all-powerful Oz.

⓱ *In the bottom example the word powerful was selected and the* No Break command *was applied to prevent the text from hyphenating.*



⓲ A discretionary hyphen *appears within the word butprints only when it appears at the end of a line.*

Setting Hyphenation Controls

My own preference is to set Words with at Least to six or more. This allows a word such as *person* to be hyphenated.

I also prefer a minimum of three letters before the hyphen and three after. This avoids breaking words as *un-excited* or *relunctant-ly.*

Hyphenate Capitalized Words?

Some people automatically turn this off so that capitalized words do not hyphenate. I don't. The command doesn't distinguish between proper nouns and words that begin a sentence. So I would rather selectively control how proper nouns break by using the No Break command or by inserting a discretionary hyphen before the word.

Sometimes you may want to prevent words or phrases from being hyphenated or breaking across lines. For instance, you might not want the words ***Mr. Cohen*** to be separated at the end of a line. You might not want a compound word such as ***self-effacing*** to be broken with another hyphen ⓱.

To apply the no-break command:

1. Select the text.
2. Choose Type >Character to open the Character palette.
3. Choose No Break from the Character palette menu.

You can also control hyphenation by inserting a ***discretionary hyphen,*** which forces the word to hyphenate at that point if it falls at the end of a line.

To use a discretionary hyphen:

1. Place the insertion point where you want the hyphen to occur.
2. Press Command/Ctrl-Shift-(hyphen).

   or

   Control/Right-click and choose Insert Special Character > Discretionary Hyphen from the contextual menu.

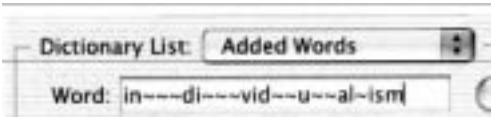
TIP The discretionary hyphen prints only when it appears at the end of the line ⓲.

TIP Insert a discretionary hyphen before a word to prevent that instance of the word from being hyphenated.

You can also edit the dictionary to control where a word is hyphenated.

To edit the hyphenationin the dictionary:

1. Choose Edit >Edit **Dictionary.**
2. Type the word you want to modify in the Word field as follows ⓳:
   - One tilde (**–**) indicates the best possible hyphenation position.
   - Two tildes (**––**) indicates the next best possible position.
   - Three tildes (**–––**) indicates the least acceptable position.
   - A tilde before the word prevents the word from being hyphenated.
3. Click Add to add the new hyphenation preferences to the dictionary.

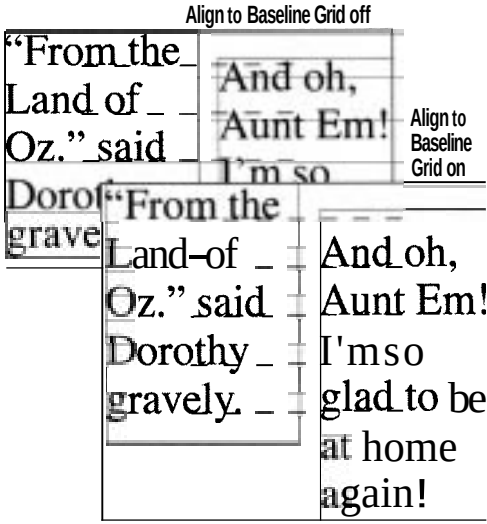


⓳ *The tilde characters control the preference for where hyphenation should occur.*

Baseline Grid

InDesign has an electronic baseline grid that you can force text to align to. The grid ensures that the bottom of the text lines up correctly in two separate frames ⓴.

TIP As you can see from the pages of this book, not all designers insist on aligning text to a baseline grid.



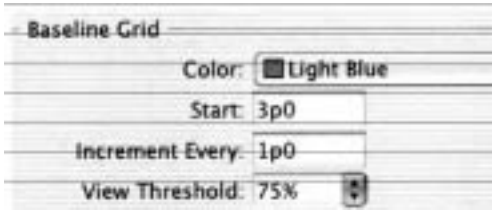
⓴ *When the* **Align to** Baseline **Grid** *is turned on, the text in two differentframes lines up.*

To set the baseline grid:

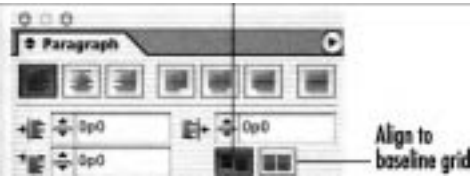
1. Choose Edit >Preferences >Grids (Win) or InDesign >Preferences >Grids (Mac). This opens the Grids dialog box ㉑.
2. Use the Color menu to set the grid color.
3. Use the Start field to control where the grid should start vertically in the document.
4. Use the Increment Every field to control the space between the gridlines.

TIP This is often the same amount as the leading for body text.

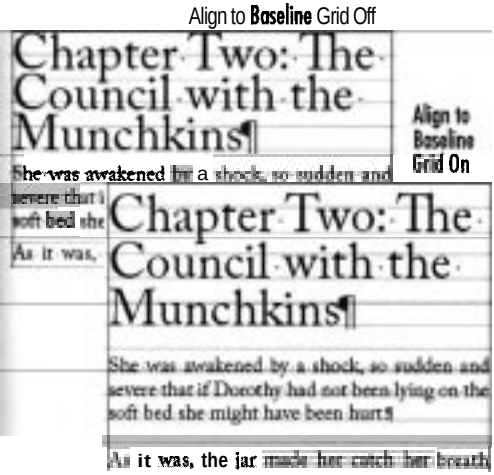
5. Set the View Threshold for the magnification amount above which the grid is visible.



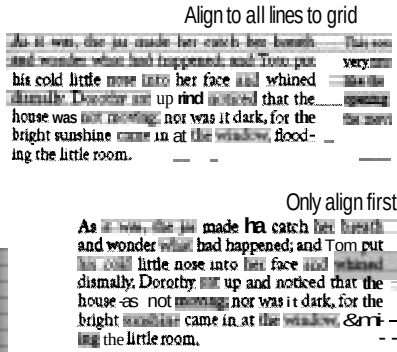
㉑ *The* Baseline Grid settings *in the Grids preferences.*



㉒ *The* Align to Baseline Grid buttons *in the Paragraph palette.*



㉓ *When text is* aligned to the baseline grid, *the leading may increase. Also the space between paragraphs may adjust.*



㉔ *Use the* Only Align First Line to Grid command *to align just the first line of a paragraph without affecting the leading.*

To align text to a baseline grid:

1. Select the text.
2. Click the Align to Baseline Grid icon in the Paragraph palette ㉒. The text aligns to the grid.

TIP When you align to the baseline grid, the grid setting overrides the leading. As a general rule, most designers set the baseline grid to the same amount as the leading for the text ㉓.

TIP Aligning to the baseline grid may also change the space between paragraphs ㉓.

Each InDesign document can only contain one baseline grid setting. However, there is a way to get a little more versatility in how text is aligned to the grid. This comes from aligning just the first line of a paragraph to the baseline grid.

To align just the first line to the baseline grid.

1. Select the text.
2. Click the Align to Baseline Grid icon in the Paragraph palette. All the lines in the paragraph will be aligned to the baseline grid.
3. Choose Only Align First Line to Grid in the Paragraph palette menu.

   or

   Choose First Line Only from the Align to Grid in the Indents and Spacing area of the Paragraph Styles dialog box.

TIP This forces the first line of a paragraph to align to the grid but allows the other lines in the paragraph to be controlled by the leading ㉔.

Balancing Ragged Lines

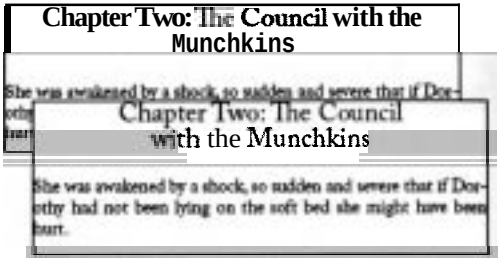
Another nuance for good typography is to make sure that there are no uneven line breaks, especially in headlines or centered type. InDesign's Balance Ragged Lines command makes this easier **e.**

To balance uneven line breaks:

1. Select the text.
2. Choose Balance Ragged Lines from the Paragraph palette menu.

   or

   Choose Balance Ragged Lines in the Indents and Spacing area of the Paragraph Styles dialog box.



25 ***The* Balance Ragged Lines command *rearranges text so there is a more equal number of words in the lines.***

Using OpenType

Instead of the paltry 256 glyphs (characters) in ordinary fonts, OpenType fonts can have thousands of glyphs. InDesign has special commands that help you get the most out of OpenType fonts. For instance, you can set the commands to automatically swap ordinary characters with special OpenType glyphs.

To set automatic OpenType alternate characters:

1. Select the text.

TIP OpenType features can be applied to **all** the text in a document or just part of the text.

2. Choose Type >Character to open the Character palette.
3. Choose the options from the OpenType submenu in the Character palette menu. InDesign automatically swaps characters with the alternate glyphs in each category **25**. ***(See the chart on pages 370–372 for a description of the various OpenType categories and how they should be used.)***

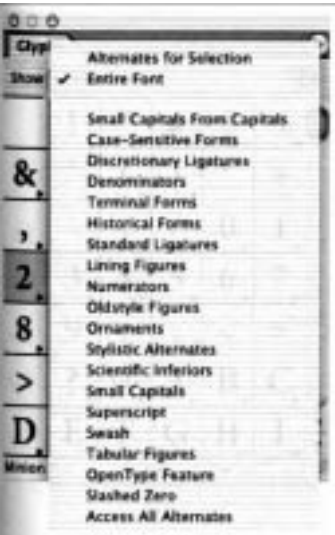
26 ***As you add more letters to an OpenType font, the previous letters change.***

What is OpenType?

OpenType is a type format that was developed by Adobe and Microsoft. OpenType fonts have many advantages over previous type formats. In addition to containing thousands of glyphs, OpenType fonts are also cross platform. This means you can use the same font on Mac or Windows without any document reflow.

Adobe sells different types of OpenType fonts. "Pro" versions of a font, such as Minion Pro, contain the extended character sets that give you access to fractions, ligatures, and other special effects. "Standard" versions, such as Futura Std, contain only the basic characters.

Press a character or letter with a triangle to see the alternate glyphs.



The Show list *in the Glyphs palette lets you choose to see the categories of specialized glyphs.*

You can also manually choose alternate glyphs for each character in the font.

To choose the alternate glyphs:

1. Select the character in the text.
2. Choose Type >Insert Glyphs to open the Glyphs palette.
3. Press the triangle next to the selected character in the palette (27). The alternate glyphs for the selection appear.
4. Choose one of the alternate characters. This replaces the selected text with the alternate character in the Glyphs palette.

You can also set the Glyphs palette to display just certain categories of glyphs.

To view certain categories in the Glyphs palette:

1. Press the Show list in the Glyphs palette.
2. Choose the category of OpenType characters that you want to display (28).

TIP Not **all** OpenType fonts contain all the possible glyph features. So the Show list will display different categories depending on the OpenType font chosen.

TIP See the chart starting on the next page for examples of how to use the OpenType categories.

OpenType Features

Feature Name	Comments	Examples	
All Caps	Changes text to uppercase letters. Also changes punctuation and spacing for the uppercase characters. For instance, notice how the question mark and hyphens are raised in the OpenType all caps formatting.	*Manually typed all caps*	¿MAMMA-MEXICO?
		OpenType all caps	¿MAMMA-MEXICO?
Small Caps	Changes lowercase text to small capital letters. Creates a much more appropriate weight for the letters compared to the fake small caps created electronically.	*Electronic small caps*	SMSOLUTIONS
		OpenType small caps	SMSOLUTIONS
All Small Caps	Changes all text, including uppercase characters, to small capital letters. This should be used for acronyms such as FBI, CIA, and PDF. The advantage to this setting is that you do not have to retype uppercase characters to make the conversion.	*Without small caps*	The FBI and **CIA** opened the IRS PDF.
		With small caps	The FBI and CIA opened the IRS PDF.
Ligatures	Applies the special letter combinations such as fi and fl. Other ligatures, such as ffi, ffl, and ff may be present in most Adobe Pro OpenType fonts.	*No ligatures*	difficult flush fish
		With ligatures	difficult **flush** fish
Discretionary Ligatures	Applies both discretionary ligatures and historical ligatures. These ligatures should be used sparingly as they are not common to contemporary text.	*No discretionary ligatures*	reaction burst
		With discretionary ligatures	**reaction burst**
Fractions	Converts numbers around a slash into numerator and denominator characters. Also changes the slash to a virgule. These are easier to apply than manual formatting and they have a better weight. The settings for Numerator and Denominator also use the fraction glyphs.	*Manually electronically styled*	3½ 4¾
		OpenType formatted	3⁄8 4¾

Feature Name	Comments	Examples	
Ordinals	Converts the characters to the superscript position. Like fractions, the OpenType version is faster to apply and has a better weight than electronic styling.	*Manually electronically styled*	1st 2nd 3rd 4th
		OpenType formatted	1st 2nd 3rd 4th
Swash	Substitutes the ordinary glyphs for a more stylized alternative. Swash glyphs are usually found in the italic version of a font. They are also contextual and may only be inserted at the beginning or end of a word. The use of swash glyphs is almost a lost typographic touch.	*Without swash*	*Quick Awesome*
		With swash	*Quick Awesome*
Contextual Alternatives	Substitutes specially designed characters that are applied depending on their context in relationship to other letters.	*Without contextual alternatives*	*bogged who fish stall look lodge*
		With contextual alternatives	*bogged who fish stall look lodge*
Stylistic Alternatives	Created by the type designer, these alternatives are inserted as alternate choices to the selected glyphs.	*Original character*	&
		Stylistic alternative	&
Superscript1 Superior	Substitutes proper superscript or superior characters for ordinary glyphs. Limited to numbers, punctuation, and a selected set of letters.	*Manually styled superscript*	x^2 $4.00 2^e
		OpenType formatted superscript	x^2 $4.00 2^e
Subscript/ Inferior	Like superscript, this substitutes proper subscript characters for ordinary glyphs. Limited to just numbers and punctuation, not letters.	*Manually stvled subscript*	H_20
		OpenType formatted subscript	H_20

continued on the ***next page***

Feature Name	Comments	Examples
Figure (number) types	There are four categories of figure types. ***Tabularfigures*** are those that have fixed-widths. They are used particularly for accounting information where the numbers need to line up under each other. ***Proportional figures*** are those that have variable widths. These should be your first choice unless it is necessary to line figures up into columns of tabular data. Figures can also be divided into two additional categories. ***Liningfigures*** have a uniform height. They are especially suited next to all cap text or for a contemporary look. ***Oldstyle figures*** have unequal heights. They look good with mixed-case text or when a more traditional look is desired. The category ***Defaultfigure*** is the category that the type designer has designated as the default for the font. This is usually tabular lining, which is unsuitable for figures within text.	These are the four types of figures. ***Tabular lining*** **12: 09/11/2001** **34: 07/22/2008** ***Tabular oldstyle*** 12: 09/11/2001 34: 07/22/2008 ***Proportional lining*** **12: 09/11/2001** **34: 07/22/2008** ***Proportional oldstyle*** 12: 09/11/2001 34: 07/22/2008

COLOR MANAGEMENT 16

I remember when my family got our first color television set. Back then, there weren't many programs broadcast in color, so a color television was a strange and mysterious thing.

No one in the family knew how to make the pictures look realistic. We jumped up to adjust the image whenever we changed channels. My sister and I spent more time fiddling with the TV controls than watching the shows.

Well, not many people understand how color is managed in desktop publishing. They don't know how to make colors look better or how to control images from different applications. They spend most of their time fiddling with the knobs.

Color is a very complex subject—far too deep for the scope of this book. This chapter covers most basic steps for managing color in InDesign. Fortunately, the controls are similar to other Adobe products. So if you've set your color management in Photoshop, you will find the same settings in InDesign.

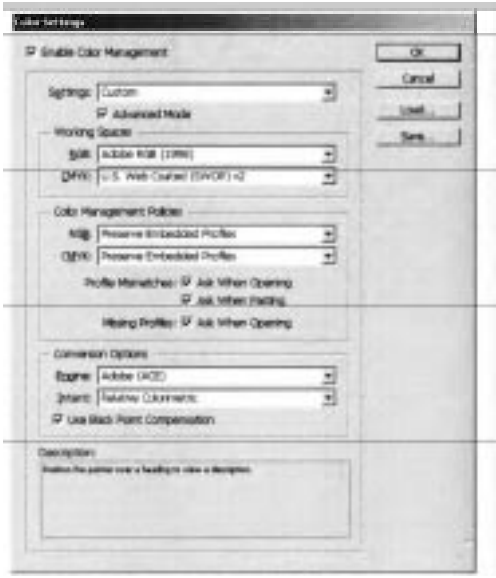
If you are interested in learning more about color, I suggest ***Real World Color Management*** by Bruce Fraser, Fred Buntin, and Chris Murphy, published by Peachpit Press.

Choosing Color Settings

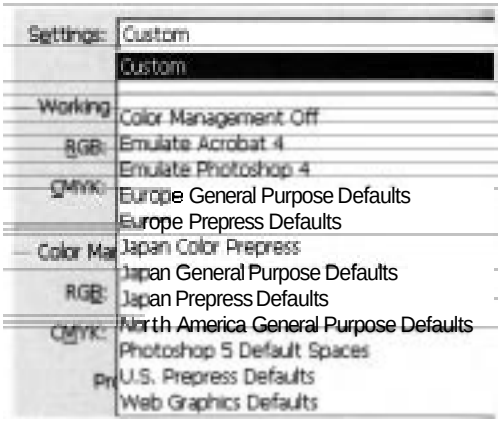
The first step for color management is to set up the color system. Fortunately, Adobe provides predefined color settings that are suitable for many users.

To turn on color management:

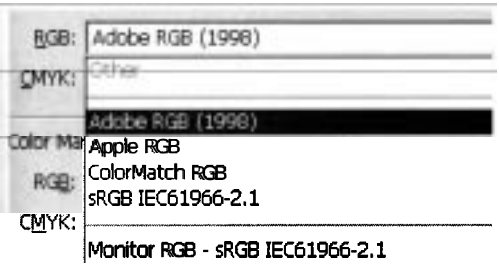
1. Choose Edit >Color Settings. This opens the Color Settings dialog box ❶.
2. Check Enable Color Management. This opens the color settings controls.
3. Choose one of the predefined settings from the Settings menu ❷:
   - Custom uses the settings you choose in the Color Settings dialog box *(see the exercises that follow)*.
   - Color Management **Off** uses minimal color management. Use this for video or on-screen presentations.
   - **ColorSync** Workflow (Mac) manages color using the ColorSync 3.0 CMSl.
   - Emulate Photoshop 4 simulates the color workflow used by Adobe Photoshop 4.0 and earlier.
   - Europe Prepress Defaults manages for typical European press conditions.
   - Japan Prepress Defaults manages for typical Japanese press conditions.
   - Photoshop 5 Default Spaces manages using the default working spaces for Photoshop 5.0 and later.
   - U.S. Prepress Defaults manages for typical U.S. press conditions.
   - Web Graphics Defaults manages for display on the World Wide Web.
4. Check Advanced Mode only if you want to set the added color controls *(see page 377)*.
5. Click OK to apply the color settings. In many cases, this is all you need to do to set color management in InDesign.



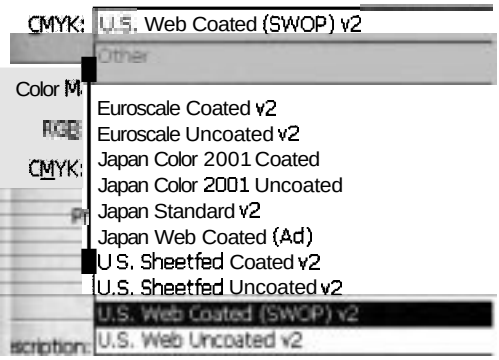
❶ *The* Color Settings dialog box *contains the controls for managing how colors are displayed and printed.*



❷ *The* Settings menu *lets you choose one of the predefined color management settings.*



❶ *The* Working **Space** *RGB* menu *lets you choose the display options for RGB colors.*



❷ *The* Working Space *CMYK* menu *lets you choose the output destination forprinting CMYK colors.*

Talk to Your Print Shop

Most designers I know are embarrassed to admit they don't understand color management. It's nothing to be ashamed of. What you need to do is talk to your print shop. Ask them what settings they recommend for color management. And remember, color management also needs to be set in image-creationapplications—such as Adobe Illustrator and Adobe Photoshop—that you use to create images placed in InDesign.

The working space applies the default color profiles for RGB and CMYK colors *(see* Chap*ter 5, "Working in Color").*

To set the RGB working space:

- Use the RGB menu to choose one of the following RGB display settings ❶:
  - Adobe RGB (1998) has a large color gamut. Use it if you do print work with a broad range of colors.
  - Apple RGB reflects the characteristics of the Apple Standard 13-inch monitor. Use for files displayed on Mac OS monitors or for working with older desktop publishing files.
  - **ColorMatch** RGB matches the color space of Radius PressView monitors.
  - **sRGB** IEC61966-2.1 reflects the characteristics of the average PC monitor. It is recommended for Web work, but is too limited for prepress.
  - Monitor RGB sets the working space to the color profile of your monitor. Use this if your other applications do not support color management.
  - **ColorSync** RGB (Mac) matches the RGB space specified in the control panel for Apple ColorSync **3.0** or later.

TIP When the Advanced Mode is chosen, the RGB **Working** Space menu displays additional options.

To set the CMYK working space:

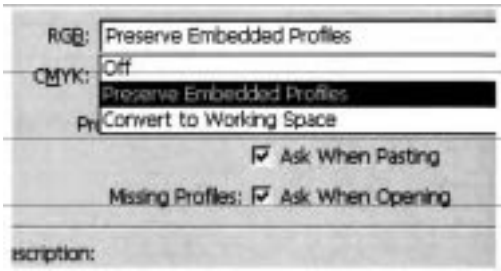
- Use the CMYK menu to choose the CMYK output settings ❷.

TIP Each setting describes the type of **ink** and paper used in the printing.

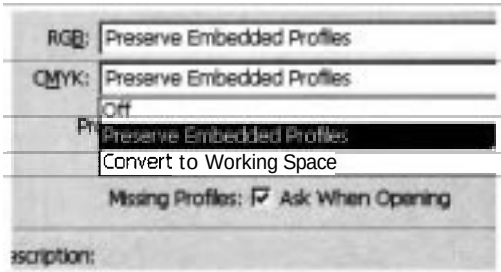
You can also set what happens when placed images contain different color profiles than the current working spaces.

To set the Color Management Policies:

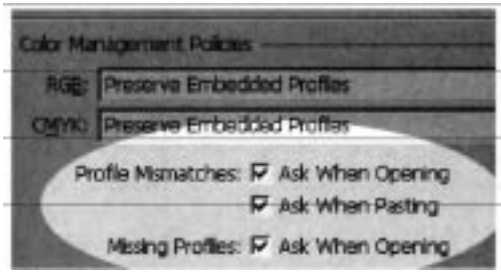
1. Choose a setting in the RGB and CMYK Color Management Policy menus as follows ❺ and ❻.
   - Off turns off color management for imported images or documents.
   - Preserve Embedded Profiles maintains the profile in the imported image or document.
   - Convert to Working Space converts placed images and documents to the working spaces you set for the InDesign document.
2. Check Ask When Opening (under Profile Mismatches) to give a choice when opening documents with different profiles ❼.
3. Check Ask When Pasting (under Profile Mismatches) to give a choice when pasting information from documents with different profiles.
4. Check Ask When Opening (under Missing Profiles) to give a choice when pasting information from documents that have no color profiles.



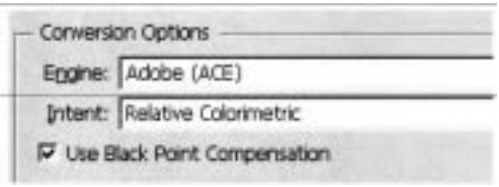
❺ ***The RGB*** Color Management Policy menu ***let you choose what to do with different RGB color profiles.***



❻ ***The*** CMYK Color Management Policy menu ***lets you choose what to do with different CMYK color profiles.***

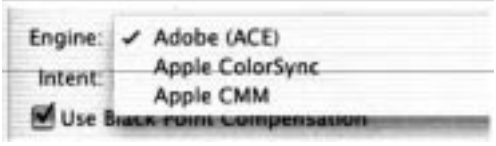


❼ ***The*** Profile Mismatches and Missing Profiles options ***control what happens when differentprofiles are in the same document.***

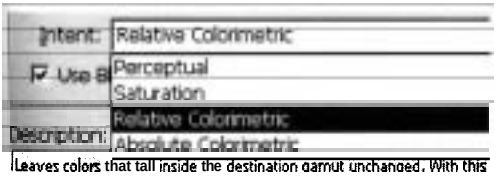


❽ *The* Conversion Options *are displayed in the Color Settings when the Advanced Mode is checked.*

❾ *The* Engine menu (Win) *lets you choose the Adobe Color Engine or the Microsoft Image Color Management for color management.*



❿ *The* Engine menu (Mac) *lets you choose the Adobe Color Engine or the Apple* ColorSync *or Apple Color Management Module for color management.*



⓫ *The* Intent menu *lets you choose how the final color display should look.*

Black and White Points?

A *white point* is the most extreme highlight in an image. This is the part of the image that should be totally white without any ink.

A *black point* is the most extreme black part of an image.

The Conversion Options, in the Advanced Mode, control how objects and color data are converted ❽.

To set the conversion options:

1. Choose one of the settings in the Engine menu ❾ and ❿.
   - Adobe (ACE) uses the Adobe color management system and color engine. This is the default setting for most preset color configurations.
   - Apple **ColorSync** (Mac) or Apple CMM (Mac) use the color management system provided for Mac OS computers. Unless you have an optional color module installed, there is no difference between the two settings.
   - Microsoft ICM (Win) uses the color management system provided for Windows computers.

TIP Choose the Adobe CMS engine if you are working with other Adobe products.

2. Choose one of the settings in the Intent menu ⓫:
   - Perceptual preserves the relationships between colors in a way that is perceived as natural by the human eye.
   - Saturation is suitable for business graphics, where the exact relationship between colors is not as important as having vivid colors.
   - Absolute Colorimetric maintains color accuracy at the expense of preserving relationships between colors.
   - Relative Colorimetric is more accurate than absolute colorimetric if the image's profile contains correct white point information. This is the default rendering intent used by all predefined color management configurations.
3. Check Use Black Point Compensation to adjust for differences in black points.

TIP Adobe strongly recommends you keep the Use Black Point Compensation option selected.

Working with Profiles

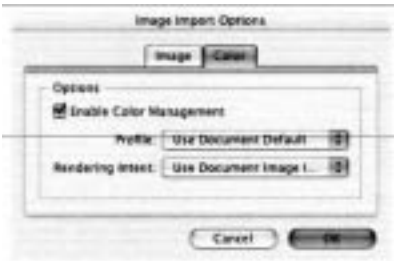
You can also set profiles and color management for individual imported images.

To control a placed image's color management:

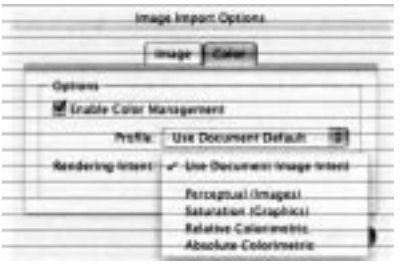
1. If the graphic has already been placed into the layout, select it, and then choose Object >Image **Color** Settings to open the Image Color Settings dialog box ⓬.

   OR

   If you're about to import the graphic, choose Color Settings on the left side of the Image Import Options dialog box. This opens the Color Settings for the Image Import Options ⓭.
2. Select Enable Color Management to apply color management to the image, or deselect it to exclude the image from color management.
3. Use the Profile menu to choose the source profile to apply to the graphic.
4. Use the Rendering Intent menu to choose a rendering intent.



⓬ ***The* Image Color Settings dialog box *allows you to assign a specific profile and rendering intent to an imported image.***



⓭ ***The* Color Settings in** the **Image Import Options dialog box** ***allows you to assign a specific profile and rendering intent to an image that is about to be imported.***

INTERACTIVE PDF ELEMENTS 17

At the risk of sounding like an old codger, I can remember when a page layout program only laid out print files. The idea of creating "push buttons" that sent you flying to other pages—or even other documents—was totally unfathomable. After all, how was someone supposed to press on a weather summary to jump to the full weather map?

So it is with some amazement that I write this chapter. Page layout no longer refers to just printed pages. InDesign has a wealth of features that let you create interactive elements for electronic documents.

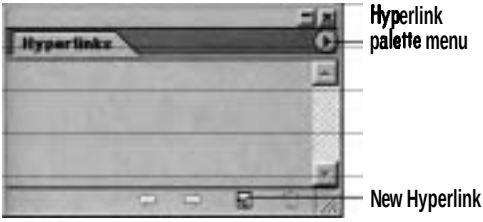
These interactive features may be simple links that let readers move from one page to another. They may be hyperlinks to Web pages. They may also be special bookmarks that can be used as navigational tools. They may even be rollover buttons that can play movies and sounds in a PDF document.

Of course, if you have no interest whatsoever in creating these type of interactive elements, feel free to skip this chapter entirely. Who cares if this is the future of publishing!

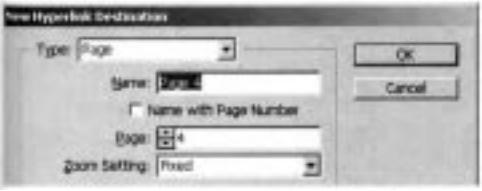
Types of Interactive Elements

There are three different types of interactive elements you can add to InDesign documents: Hyperlinks, Bookmarks, and Buttons. Each has their own particular uses, but some of the features may overlap. Before you start work, decide which type of interactive element is right for you.

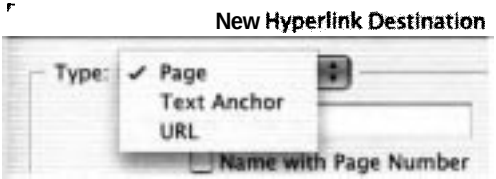
Feature	Description	Advantages	Limitations
Hyperlinks	Adds a hotspot area to text or objects that is linked to other parts of the document, other documents, or Web pages.	Can be applied directly to the text inside a story. Can be created automatically using the Table of Contents or Indexing features.	Only very primitive visual indications of the linked area.
Bookmarks	Adds a navigational element that is visible in the Adobe Reader Bookmark pane.	The Bookmark pane is visible at all times in the document. Can be created automatically using the Table of Contents feature.	Requires some education to teach the reader how to use the Bookmark pane in the Reader. Is not directly on the document page. No special visual indication in the document.
Buttons	Adds a hotspot area that can contain text or graphics. This hotspot can be set to invoke a wide variety of behaviors including navigation as well as playing movies or sounds.	Offers the most navigational and design choices.	Buttons can not be created automatically from text.



❶ *The* Hyperlinks palette *is used to define both the destinations and the hyperlinks.*



❷ *The* New Hyperlink Destination dialog box *lets you set a page destination.*



❸ *The* Type menu *lets you choose the type of hyperlink destination.*

Which Comes First, Source or Destination?

Maybe it's years of working in HTML or JavaScript, but the first time I tried to create hyperlinks in InDesign, I got all fouled up. I started by trying to define a source for the hyperlink—the item that you click—and then setting its destination—the place where the link sends you.

InDesign doesn't work this way. You must set the destination first, and then set the source. I know it seems backward, but that's the way it must be done.

Defining Hyperlinks

A hyperlink is an area of a page that can be clicked to send the reader to a new page, open a new document, move to a Web page, or send an e-mail message. There are two parts to creating a hyperlink. The *source* is the object or text that you click to trigger the hyperlink. The *destination* is the page or Web link you go to.

TIP You must define a destination first, before you define the source.

TIP Hyperlinks are applied when the file is exported as an Adobe PDF *(see page 451)* or when you use the Package for GoLive feature *(seepage 473)*.

To choose the type of hyperlink:

1. Choose Window > Interactive > **Hyperlinks.** This opens the Hyperlinks palette ❶.
2. Choose New Hyperlink Destination from the Hyperlinks palette menu. This opens the New Hyperlink Destination dialog box ❷.
3. Choose the type of hyperlink from the Type menu as follows ❸:
   - Page creates a page destination that links to a specific page in the document. This is the only type of hyperlink that lets you set a magnification for the link. *(See the next exercise for how to create a page destination.)*
   - Text Anchor creates a link to a selected area of text. This option is only available if you have selected text. *(See the exercise on page 343 for how to create a text anchor destination.)*
   - URL lets you link to an internet page. *(See the exercise on page 383 for how to create a URL destination.)*

A page destination specifies the page and the magnification to use when you move to the link.

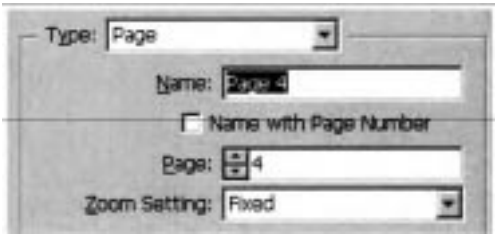
To create a page destination:

1. Choose New Hyperlink Destination in the Hyperlinks palette menu to open the New Hyperlink Destination dialog box.
2. Choose Page from the Type menu. This opens the settings for the page destination ❹.
3. Use the Page controls to enter the page number that you want to jump to.
4. If desired, use the Name field to enter a descriptive name for the page.

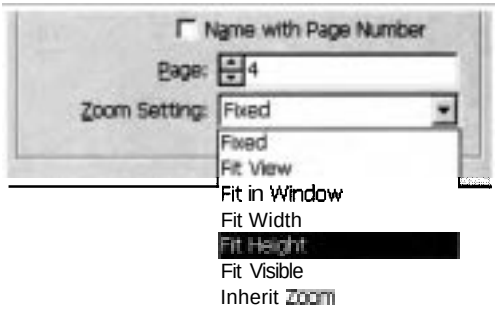
   or

   Check the Name with Page Number option to automatically name the destination with its page number and whatever Zoom setting has been chosen.
5. Choose the Zoom settings as follows ❺:
   - Fixed displays the page as it was when the link was created.
   - Fit View displays the visible portion of the page.
   - Fit in Window displays the entire page in the document window.
   - Fit Width or Fit Height displays the width or height of the page.
   - Fit Visible displays the areas that contain text or graphics.
   - Inherit Zoom displays the same magnification that was active when the link was chosen.
6. Click OK to create the destination.

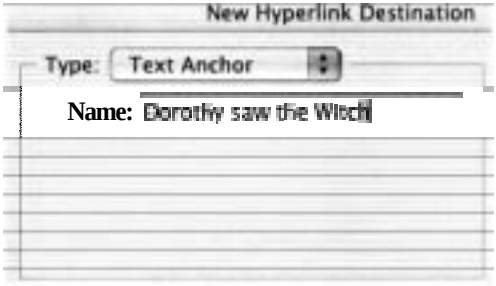
TIP Don't worry that you don't see your destination listed in the **Hyperlinks** palette. Destinations aren't shown there. Destinations are shown when you define the **hyperlink** source *(see page* 385).



❹ ***The New Hyperlink Destination dialog box set for a*** Page destination.



❺ ***The*** Zoom Setting menu ***controls the magnification of the destination page.***



❻ *The New Hyperlink Destination dialog box set for a* Text Anchor destination.

❼ *The New Hyperlink Destination dialog box set for a* **URL** destination.

The second type of hyperlink is a text anchor. A text anchor destination allows you to link to a specific area of text on a page.

To create a text anchor destination:

1. Highlight the text that you want to be the destination.
2. Choose New Hyperlink Destination in the Hyperlinks palette menu. This opens the New Hyperlink Destination dialog box.
3. Choose Text Anchor from the Type menu ❻.
4. Use the default name which comes from the selected text.

   or

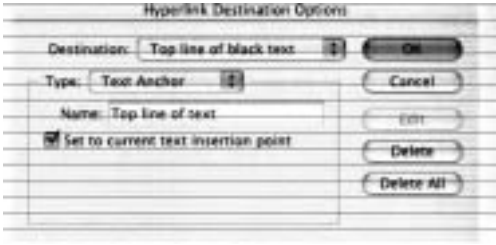
   Enter a name for the destination.

The third type of hyperlink is a URL (uniform resource locator). These are the links that can be used to open Web pages, send e-mail, or transfer files.

To create a URL destination:

1. Choose New Hyperlink Destination in the Hyperlinks palette menu to open the New Hyperlink Destination dialog box.
2. Choose URL from the Type menu ❼.
3. Enter a name for the destination.
4. Enter the URL information.

You can use the Hyperlink Destination Options dialog box to edit the destinations that you create for the document. This is also the place where you can see which destinations have been defined for your document.



1 ***Use the*** Hyperlink Destination Options dialog box ***to edit the destinations in a document.***

To edit a destination:

1. Choose Hyperlink Destination Options in the Hyperlinks palette menu to open the dialog box.
2. Choose a previously defined destination from the Destination list.
3. Click the Edit button **2**. The controls for the destination become active.

TIP These controls change depending on the type of destination chosen.

4. Make whatever changes you want to the destination.

   or

   Click the Delete button to delete the destination from the document.

   or

   Click the Delete All button to delete all the destinations from the document.

TIP If you are editing a Text Anchor Destination you can change the text destination by selecting Set to current text insertion point.

1 ***The*** New Hyperlink dialog box ***lets*** you ***link to destinations as well as set the appearance*** of ***the hotspot area.***

Once you have set the hyperlink destinations, you can then create the **hyperlink** sources that are linked to those destinations.

To create a hyperlink from an existing destination:

1. Select the text or graphic that you want to be the **hotspot** or trigger area for the link.
2. Click the New Hyperlink button in the Hyperlinks palette.

   or

   Choose New Hyperlink from the Hyperlinks palette menu. The New Hyperlink dialog box appears **1**.
3. Use the Name field to name the hyperlink. This is the name that appears in the Hyperlinks palette.
4. Set the hyperlink destinations as described on pages **381–384..**
5. Set the Appearance as described in the exercise on page **388.**
6. Click OK to create the hyperlink. The link appears in the **Hyperlinks** palette.

To choose a page destination:

1. In the New Hyperlink dialog box, choose Page from the Type menu. This opens the Page Destination area ⑩.
2. Use the Document list to choose the destination document. This adds any destinations that were defined in that document to the Name menu.
3. Choose a previously defined Page destination from the Name menu ⑪.

Of course it's possible to create a hyperlink without having previously defined a page destination.

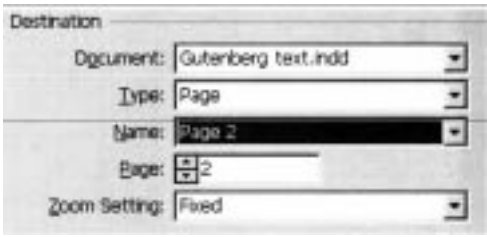
To create an unnamed page destination:

1. In the New Hyperlink dialog box, choose Page from the Type menu. This opens the Page Destination area.
2. Choose [Unnamed] from the Name menu. This allows you to define an unnamed destination.
3. Use the Page controls to set the page number.
4. Set the Zoom Setting as described on page **338.**

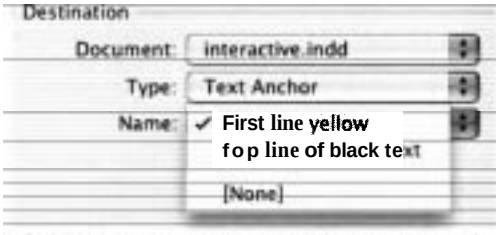
TIP The term [Unnamed] only applies to the destination. The hyperlink still appears in the Hyperlinks palette ⑫.

To choose a text anchor destination:

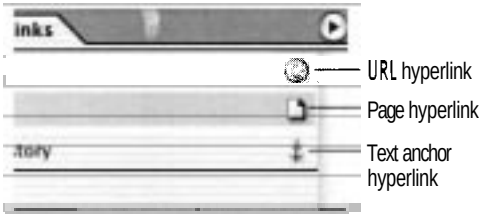
1. In the New Hyperlink dialog box, choose Text Anchor from the Type menu.
2. Use the Document list to choose the destination document. This adds any destinations that were defined in that document to the Name menu.
3. Choose a previously defined Text Anchor destination from the Name menu ⑬.



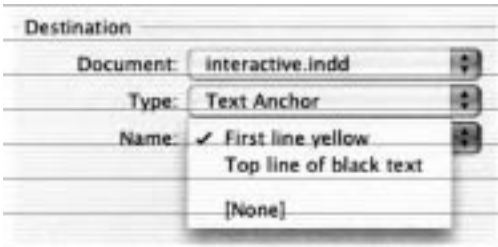
⑩ *The* Page Destination area *of the New Hyperlink dialog box lets you set the destinations for hyperlinks.*



⑪ *The* Name menu *lets you choose previously defined page destinations for a hyperlink.*

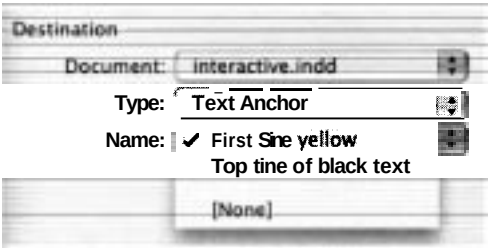


⑫ *Hyperlinks appear in the Hyperlinkspalette. Icons show the type of hyperlink.*

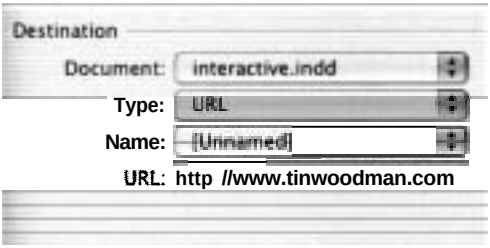


⑬ *The* Name menu *lets you choose a previously defined text anchor as a destination for a hyperlink.*

⓮ *The* **URL** Destination area *of the New Hyperlink dialog box lets you set the destinations for* ***URL*** *hyperlinks.*



⓯ *The* Name menu *lets you choose previously defined* ***URL*** *destinations for a hyperlink.*



⓰ *The* **URL** Destination area *lets you create an unnamed destination.*

To choose a previously defined URL destination:

1. In the New Hyperlink dialog box, choose UFU from the Type menu. This opens the URL Destination area ⓮.
2. Use the Document list to choose the destination document. This adds any destinations that were defined in that document to the Name menu.
3. Choose a previously defined URL destination from the Name menu ⓯.

You can easily create a URL destination without having previously defined a URL destination.

To create an unnamed URL destination:

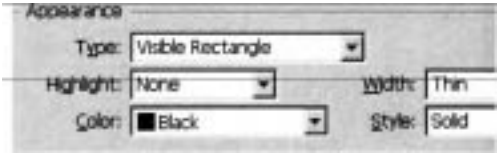
1. In the New Hyperlink dialog box, choose URL from the Type menu. This opens the URL Destination area ⓰.
2. Choose [Unnamed] from the Name menu. This allows you to define an unnamed destination.
3. Enter the URL in the URL field.

TIP The term [Unnamed] only applies to the destination. The hyperlink itself still has the name you enter at the top of the New Hyperlink dialog box.

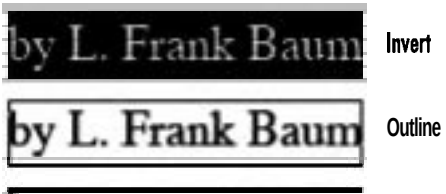
TIP You can also create a URL hyperlink by highlighting a URL contained in the text and choosing New Hyperlink from URL in the Hyperlinks palette menu. This adds the hyperlink to the palette and automaticallysets the destination as the highlighted URL text.

To choose the appearance of a hyperlink:

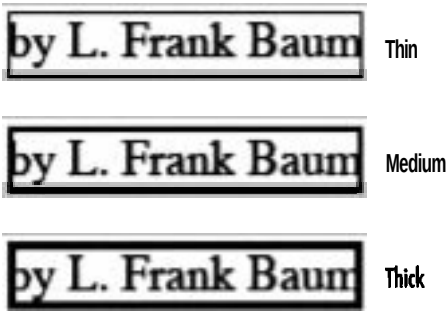
1. Use the Type menu in the Appearance area to choose a setting for the visibility of the rectangle around the hotspot ⓱.
   - Visible Rectangle creates a rectangular area that can be seen.
   - Invisible Rectangle creates a hotspot area that is not shown.
2. Use the Highlight menu to choose the appearance of the hotspot area when clicked ⓲.
   - None makes no highlight on the area.
   - Invert creates the effect of inverting the colors of the hotspot area.
   - Outline creates an outline rectangle around the hotspot area.
   - Inset creates the effect of a 3D cutout in the hotspot area.
3. Use the Width menu to choose thickness of the visible rectangle ⓳.
   - Thin is the most tasteful setting.
   - Medium is a more obvious setting.
   - Thick is really too ugly to use.
4. Use the Style menu to choose the type of line for the visible rectangle ⓴.
   - Solid is the most tasteful setting.
   - Dashed doesn't look as nice.
5. Choose a color from the Color menu.



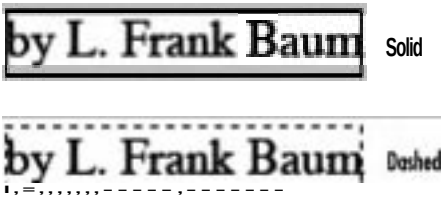
⓱ ***The*** Appearance area ***of the New Hyperlink dialog box lets you set how hyperlinks are displayed in the document.***



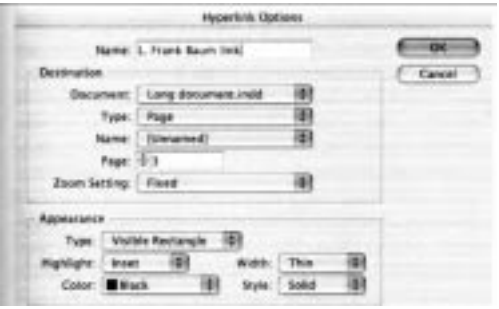
⓲ ***Examples of the three*** Highlight effects ***applied to links.***



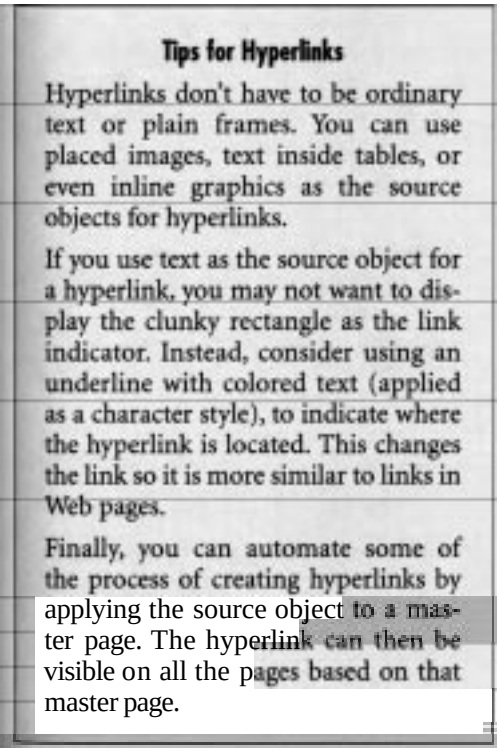
⓳ ***Examples of the three*** Width settings ***applied to links.***



⓴ ***Examples of the*** Style settings ***applied to links.***



1 ***The*** Hyperlink Options dialog box ***lets you edit the settings*** for ***hyperlinks.***



Tips for Hyperlinks

Hyperlinks don't have to be ordinary text or plain frames. You can use placed images, text inside tables, or even inline graphics as the source objects for hyperlinks.

If you use text as the source object for a hyperlink, you may not want to display the clunky rectangle as the link indicator. Instead, consider using an underline with colored text (applied as a character style), to indicate where the hyperlink is located. This changes the link so it is more similar to links in Web pages.

Finally, you can automate some of the process of creating hyperlinks by applying the source object to a master page. The hyperlink can then be visible on all the pages based on that master page.

As you work, you can edit the settings for the hyperlink source.

To edit hyperlinks:

1. Double click the hyperlink entry in the Hyperlinks palette.

   or

   Choose Hyperlink Options in the Hyperlinks palette menu. This opens the Hyperlink Options dialog box **1**.
2. Make changes in the Hyperlink Options dialog box.

Once you have created a hyperlink, you can change or reset the text selection or frame that was used as the source object.

To reset the hyperlink source:

1. Highlight the text or select the frame that you want to be the new hyperlink source.
2. In the Hyperlinks palette, select the hyperlink that you want to change.
3. Choose Reset Hyperlink from the Hyperlinks palette menu. The original source object is changed to the new selection.

If you have named an external document as a destination, you may need to update the hyperlink to that external document. For instance, if the page name or location has changed, the hyperlink needs to be updated.

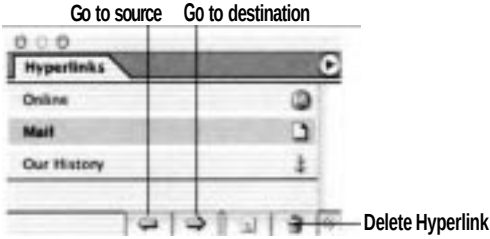
To update the hyperlink to an external document:

1. Select the Hyperlink in the Hyperlinks palette.
2. Choose Update Hyperlink from the Hyperlink palette.
3. Choose Reset Hyperlink from the Hyperlinks palette menu.

TIP If the external document is closed, hold the Opt/Alt key to open the document.

Working with Hyperlinks

Once you have set up your destinations and hyperlinks, you can use the Hyperlinks palette to navigate through the document using the Hyperlinks palette. This lets you easily move to specific locations in your InDesign document.



22 ***You can use the*** Hyperlinks palette ***to navigate through the document.***

To move to a hyperlink:

1. Select the hyperlink in the Hyperlinks palette **22**.
2. Choose Go to Source from the Hyperlinks palette menu.

   or

   Click the Go to Source icon in the Hyperlinks palette.

To move to a hyperlink destination:

1. Select the hyperlink in the Hyperlinks palette.
2. Choose Go to Destination from the Hyperlinks palette menu.

   or

   Click the Go to Destination icon in the Hyperlinks palette.

TIP If the destination is a URL, the default Web browser will be launched.

To delete a hyperlink destination:

1. Select the hyperlink in the Hyperlinks palette.
2. Choose Delete Hyperlink from the Hyperlinks palette menu.

   or

   Click the Delete Hyperlink icon in the Hyperlinks palette.

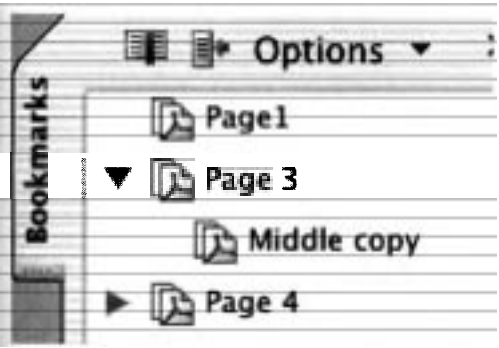
Automatic Hyperlinks

If it seems too much work to create manual hyperlinks, remember that you automatically create hyperlinks when you use the Table of Contents or Index features.

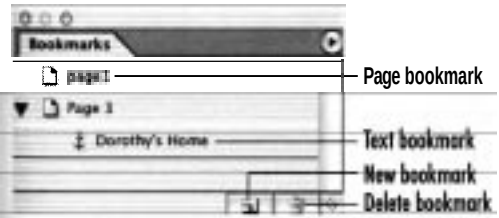
The manual Hyperlinks are best used for those instances when you need to add just a few links to a document. For instance, you might want to add a URL address to a sales brochure or a page link to a small document.

Exporting and Testing Hyperlinks

You must export the InDesign file as a PDF in order to test your hyperlinks *(see Chapter 18, "Output" for how to export as a PDF)*. Also, you must remember to check the option to include hyperlinks in order to make them active in the PDF.



㉓ *The* Bookmarks pane *in Acrobat displays the bookmarks created in InDesign.*



㉔ *The* Bookmarks palette *holds the bookmarks created for the document.*

Working with Bookmarks

Bookmarks provide a different way to navigate within a document. Instead of elements on the page, bookmarks are displayed in the Adobe Acrobat or Adobe Reader Bookmark pane ㉓. The reader clicks each bookmark to move to that position in the document. One of the advantages to using bookmarks is that the bookmark pane can be always visible next to the area being read. Also, bookmarks can be expanded or collapsed to shorten the length of the bookmark list.

To create a bookmark:

1. Choose Window >Interactive >Bookmark to open the Bookmarks palette ㉔.
2. Do one of the following to create the destination for the bookmark:
   - Place the insertion point at a point within the text. This creates a text bookmark.
   - Select the text. This creates a text bookmark named with the selected text.
   - Select a frame or graphic. This creates a page bookmark.
   - Double-click a page in the Pages palette. This creates a page bookmark.
3. Click the New Bookmark icon in the Bookmarks palette.

   or

   Choose New Bookmark from the Bookmarks palette menu. The bookmark is added to the Bookmarks palette.

TIP Icons show the difference between text and page bookmarks although there are no such differences in Acrobat.

TIP If you already have bookmarks in the Bookmarks palette, the new bookmark is created directly under whichever bookmark is selected in the palette. ***(See page 393 for how to move bookmarks to new positions.)***

New bookmarks are created with the name Bookmark 1, Bookmark 2, and so on. You can rename the bookmark with a more descriptive name to help readers know what is located there.

To rename a bookmark:

1. Select the bookmark in the Bookmarks palette.
2. Choose Rename Bookmark from the Bookmarks palette menu. This opens the Rename Bookmark dialog box 25.
3. Enter a new name in the field and click OK.

You can also rename a bookmark directly in the list area of the Bookmarks palette.

To rename a bookmark in the list area:

1. Click once to select the bookmark in the Bookmarks palette.
2. Click again to open the field that contains the bookmark name 26.
3. Type the new name.
4. Press Return/Enter or click a different bookmark to apply the new name.

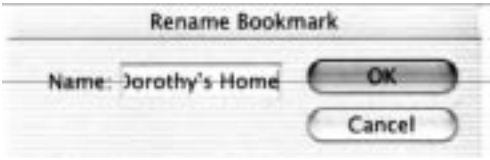
You can also delete bookmarks you no longer want in the document.

To delete a bookmark:

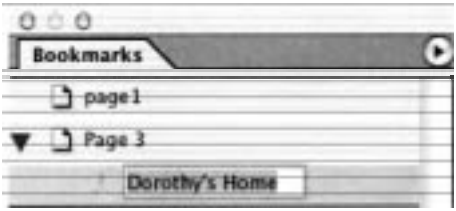
1. Select the bookmark in the Bookmarks palette.
2. Choose Delete bookmark from the Bookmarks palette menu.

   or

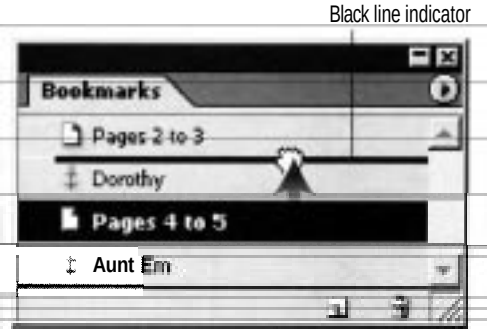
   Click the Delete Bookmark icon in the Bookmarks palette.



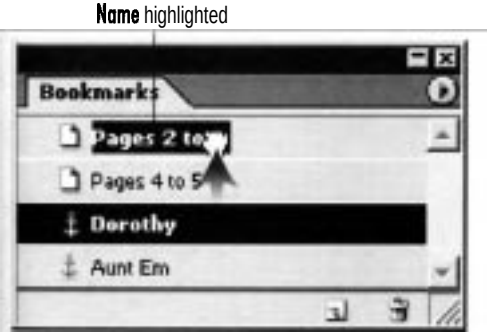
25 ***Use the*** Rename Bookmark dialog box ***to change the bookmark names.***



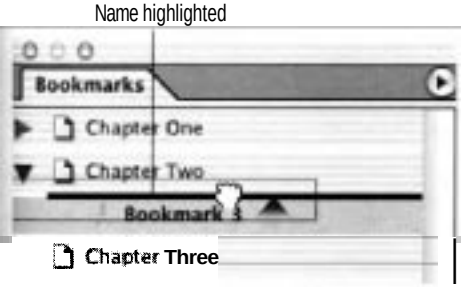
26 Click the bookmark name ***to type a new name directly in the Bookmarks palette.***



27 ***Drag the bookmark up to*** move it to a new position ***in the Bookmarks palette.***



28 ***Drag the bookmark onto the name*** to nest it under another bookmark.



29 ***Drag the bookmark up until you see the black line*** to unnest it from a bookmark.

Bookmarks don't have to appear in the order that you create them. You can move important bookmarks up to the top of the list, even if they refer to pages that are at the end of your document.

To move bookmarks to new positions:

1. Drag the bookmark up or down the list to the new position.
2. When you see a black line appear, release the mouse button. The bookmark moves to the new position 27.

TIP Use the Sort Bookmarks command to rearrange the bookmarks into the order they occur in the document.

You can also nest, or move bookmarks so they are contained within others. The top bookmark is called the ***parent;*** the nested bookmark is called the ***child.*** This allows you to have a very long bookmark list that can be expanded as necessary.

To nest bookmarks:

1. Drag the bookmark you want to nest onto the name of the parent bookmark.
2. When the name is highlighted, release the mouse 28. The child bookmark is indented under the parent. A triangle controller appears that lets you open or close the parent bookmark.

TIP When you delete a bookmark, you also delete any bookmarks that are nested within that bookmark.

TIP You can continue to nest bookmarks through as many levels as you want.

To unnest bookmarks:

1. Drag the child bookmark out from the parent so that the black line is no longer indented below the parent bookmark 29.
2. Release the mouse button. The child bookmark is no longer nested.

Adding Sounds

Despite the mind-bending concept of adding sound to a page layout, it's actually very simple to add sounds to an InDesign document. Just remember, you won't actually play the sound in InDesign. The sound is played as part of a PDF, when repurposed as part of an XML document, or packaged for GoLive.

To add a sound to a document:

1. Choose **File > Place** and then choose the sound file you want to import. The cursor changes into the Sound cursor (30).
2. Click the sound cursor on the document. This adds a sound clip object to the document.

TIP The sound clip displays the name of the sound and the sound clip icon (31).

TIP The sound clip is displayed with an image that Adobe provides as the sound poster. This file is called *StandardSoundPoster.jpg* and can be swapped for any other image you want to use.

You can also add an empty sound clip that can be filled with a sound at some other time.

To add an empty sound clip:

1. Draw a frame.
2. Choose Object > **Interactive > Sound Options**. This opens the Sound Options dialog box (32).
3. Enter a name in the Sound Options dialog box and click OK. The frame has been converted to an empty sound clip.

(30) ***The* Sound Clip cursor *indicates you are importing a soundfile.***

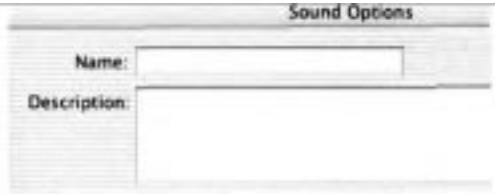
(31) **A sound media clip** ***created* by *converting a frame.***

(32) **A Sound Options dialog box** ***for an empty sound clip. Notice there is no file specified under Options.***

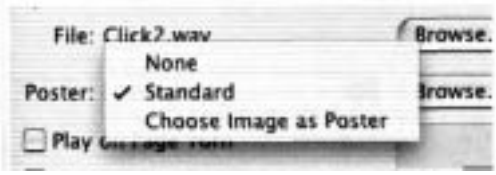
Sound and Video Requirements

InDesign supports the same media file types as Adobe Acrobat. This means that you can import any sound or video file that can be played by Apple QuickTime, Flash Player, Windows Built-in Player, and Windows Media Player.

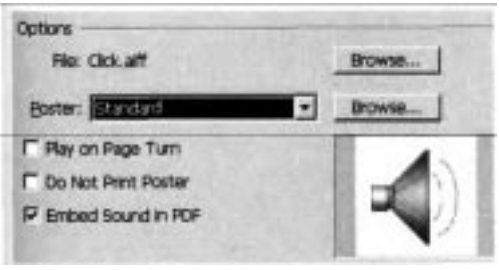
On the Mac, QuickTime plays all the media files. So all you need is QuickTime 6 or later. On Windows, you need QuickTime as well as the other players.



33 *You can set a* name and description for a sound *in the Sound Options dialog box.*



34 *The* Sound Options Poster menu *lets you choose the image that is displayed in a sound clip.*



35 *The* Options controls *for a sound in the Sound Options dialog box.*

If you have an empty sound clip, you use the Sound Options dialog box to fill it with a sound and set the other sound properties.

TIP You can also edit a filled sound clip by modifying the settings in the Sound Options dialog box.

To set the Sound Options:

1. Open the Sound Options dialog box by double-clickingthe sound clip.

   or

   Select the sound clip and choose Object > Interactive > **Sound** Options.
2. Enter a name for the sound clip in the Name field **33**. This name is just to help you identify which sounds have been added to the document.
3. If desired, enter a description that can be read by hearing-impaired users.
4. Use the Browse button to add a sound to the sound clip or to change the sound in the clip.
5. Use the Poster menu to choose an image that will be used to show where the sound is in the document **34**.
   - None leaves the sound clip frame empty.
   - Standard uses the standard icon **34**.
   - Choose Image as Poster lets you import a custom image to use as the sound poster.
6. Use the Browse button to choose the custom image **35**.
7. Check Play on Page Turn to have the sound automatically play when the page is opened **35**.
8. Check Do Not Print Poster to prevent the poster image from printing **35**.
9. Embed Sound in PDF to add the sound file to the PDF. If this is unchecked, you will have to make sure the sound file is kept with the PDF document **35**. *(See the sidebar on the nextpage.)*

Adding Movies

Movies can be easily added to an InDesign document. Just remember, you won't actually play the movie in InDesign. The movie is played as part of a PDF, when repurposed as part of an XML document, or packaged for GoLive. Consider what it would be like if this book came as a PDF. Instead of the static images, you could see little movies that showed how things work.

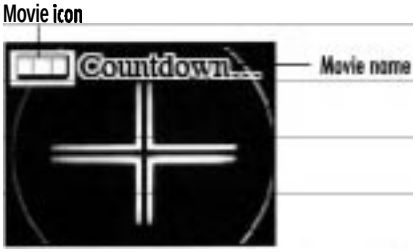
To add a movie to a document:

1. Choose File >Place and then choose the movie file you want to import. The cursor changes into the Movie cursor 36.
2. Click the movie cursor on the document 37. This adds a movie clip object to the document.

TIP The movie clip displays the name of the movie and the movie clip icon.

TIP The movie clip is displayed with the default poster image that was set for the movie when it was created. *(See page 399 for how to change the movie poster.)*

36 *The* **Movie Clip** *cursor indicates you are importing a sound file.*



37 **A movie clip** *appears when you click to import a movie.*

Linking versus Embedding Media Clips

Media clips such as movies and sound files can be linked to the PDF or embedded in the document. You can choose either one, but be aware of the limitations of each method.

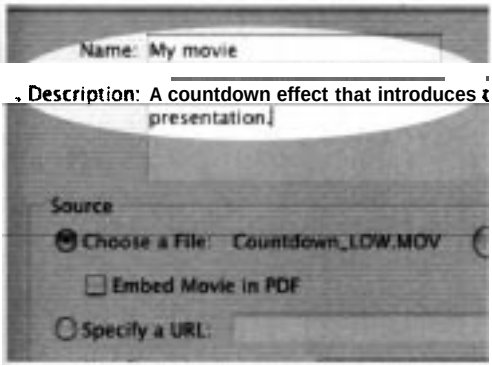
Embedding a media clip adds to the size of the PDF. In the case of movies, this can add greatly to the final size of the file. If you embed a movie clip, only those viewers with Acrobat 6 or Adobe Reader will be able to view the movie. Users with earlier versions of the software will have to upgrade in order to view your documents correctly.

Linking to a media clip keeps the file size down, but then you must remember to keep the media clip with the PDF or it will not play properly.

Also, if you link to a media clip, it resides outside the PDF document. This can cause problems if you distribute your files on CD-ROM. Someone can copy the movie to use for their own purposes. If you don't want people to be able to use your media for their own projects you can embed the media clip to prevent them from easily snatching the sound or movie to use in their own work.

You can control if media clips are linked or embedded in the Sound or Movie Options dialog boxes, or when you export the PDF *(see page 455)*.

38 *The* Movie Options dialog box for an *empty movie clip frame.*



39 *Use the Movie Options dialog box to set the* Name and Description *for a movie.*

You can also add an empty movie clip that can be filled with a movie at some other time or used as the placeholder for a movie connected from a URL (see page *398*).

To add an empty movie clip:

1. Draw a frame.
2. Choose Object >Interactive >Movie Options. This opens the Movie Options dialog box.
3. Enter a name in the Movie Options dialog box and click OK. The frame holds an empty movie clip 38.

If you have an empty movie clip, you use the Movie Options dialog box to fill it with a movie and set the other movie properties.

TIP You can also edit a filled movie clip by modifying the settings in the Movie Options dialog box.

To set the name and movie description:

1. Open the Movie Options dialog box by double-clicking the movie clip,

   or

   Select the movie clip and choose Object > Interactive >Movie Options.
2. Enter a name for the movie clip in the Name field 39.

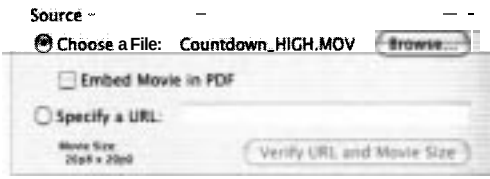
TIP When you fill a movie clip, it uses the name of the actual movie file by default. You can rename it in the Movie Options dialog box.

3. If desired, enter a description to help identify the movie 39. This description is used if the movie cannot be played or for visually impaired users who use screen readers to hear the description of the file.

The movie source is the movie clip that will be played. You have several options for how to choose the movie source ㊵.

To add a movie to the document movie clip:

1. In the Movie Options dialog box, click Choose a File.
2. Click the Browse button to navigate to find movie you want to add to the document.
3. Click Embed Movie in the PDF to add the movie to the exported PDF. ***(See the sidebar on page 396 for more information on embedding or linking movies.)***



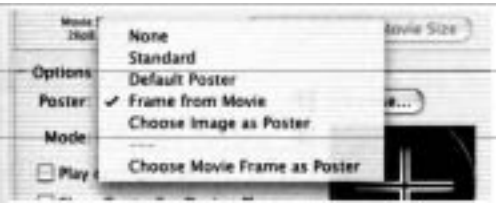
㊵ ***The*** Source controls ***set to play a local file within the document.***

㊶ ***The*** Source controls ***set to play a URL-based movie within the document.***

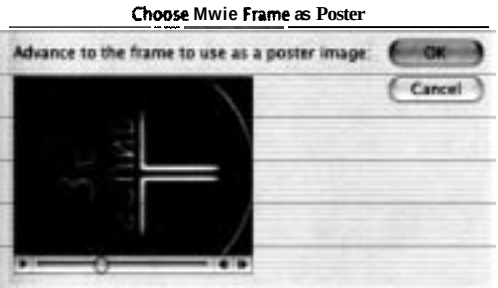
You can also play streaming media in your PDF document. This avoids all problems with file sizes. However, it does mean that an internet connection must be available when the movie is played.

To choose a URL connection for a movie:

1. Create an empty movie frame and then open the Movie Options dialog box *(see page* 397).
2. In the Movie Options dialog box, click Specify a URL ㊶.
3. Type the URL where the movie can be accessed.
4. If you have an active internet connection, click Verify URL and Movie Size to make sure the settings are correct.



41 *Use the* Poster menu *to choose the image that is displayed on the static page.*



@ *Use the* Choose Movie Frame as Poster dialog box *to choose the frame you want to add as the movie poster.*

44 *Use the* Mode menu *to choose how often the movie plays.*

Movie Display Options

You can also set the poster options for the movie. This allows you to set an image that !ills the space in the frame for the movie clip.

To set the movie poster options:

- In the Movie Options dialog box, choose one of the following from the Poster menu 42:
  - None sets no poster for the movie.
  - Standard uses the image from the StandardMoviePoster.jpg file that Adobe provides with InDesign.
  - Default Poster uses the poster image that was created when the movie was edited.
  - Choose Image as Poster lets you click the Browse button to choose an image to use as the poster.
  - Choose Movie Frame as Poster opens a dialog box that lets you advance through the movie to choose the poster 43. When this option is chosen, the listing Frame from Poster is checked in the menu.

You can also set the options for how often the movie plays.

To set the play options for the movie:

- In the Movie Options dialog box, choose one of the following from the Mode menu 44:
  - Play Once Then Stop plays the movie a single time.
  - Play Once Stays Open plays the movie, then leaves the movie player open. This allows the viewer to set the movie to play again.
  - Repeat Play sets the movie to play over and over in a loop.

You can also set the rest of the options for how the movie plays 45.

To set the movie display options:

1. Check Play on Page Turn to have the movie automatically play when the page is opened.

TIP A movie or sound clip may take a moment to load before it starts playing.

TIP The automatic page turn isn't the only way to play movies. A movie can be played by clicking the movie object in the PDF page. Also, you can create button behaviors that play movies.

2. Check Show Controller During Play to display the user controls that let you start, stop, rewind, forward, and change the sound of the movie 46.
3. Check Floating Window to display the movie in a separate window that appears above the Acrobat document.
4. If you check Floating Window, use the Size menu to set the dimensions of the movie window 47.

TIP The size options for a floating window movie are listed in sizes that are multiples of the original movie size. 1/2x means one-half times the size of the original. 3x means three times the size of the original. Max means the maximum size to fit the monitor.

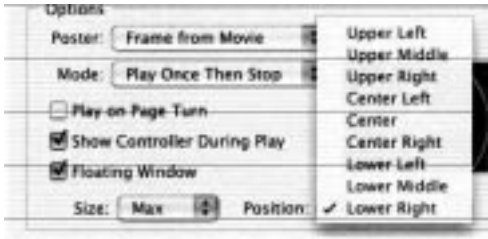
TIP A movie that is non-floating is displayed at the size that it was originally created.

5. If you check Floating Window, use the Position menu to set where the movie plays in relation to the Acrobat document 48.

45 *The settings at the bottom of the Movie Options dialog box that* control how the movie plays.

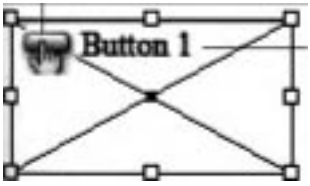
46 *The* Controller *is displayed at the bottom of the movie.*

47 *Use the* Size menu *to set the size of a movie that plays in a floating window.*

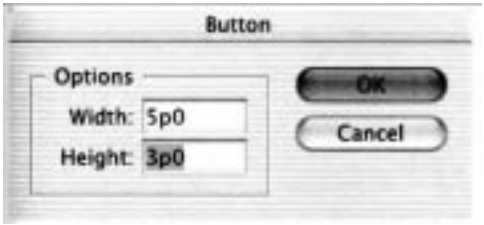


48 *Use the* Position menu *to choose where a movie thatplays in a floating window is displayed.*

49 *The* Button tool *in the Toolbox.*



50 *A* Button object *displays a button icon and a button name.*



51 *You can use the numerical controls in the* Button dialog box *to set the size of a button.*

52 *An example of how a button can contain text or an image.*

Creating Buttons

Buttons go much further than links. Links let you move to destinations or open Web pages. Buttons contain the code that can send you to destinations, flip pages, open Web pages, play movies, show and hide other buttons, and other tricks. The first thing you want to do is create a button and assign a simple action.

To create a button manually:

1. Select the Button tool in the Toolbox 49.
2. Drag across the page to create the button object. The button appears on the page with a button icon and name 50.

TIP The entire frame is considered the button, not just the little button icon in the frame.

TIP Buttons are drawn like any other object. Use all the same modifier keys and techniques that you use when drawing objects. *(See Chapter 4, "Working with Objects," for more information on drawing objects.)*

To create a button numerically:

1. Select the Button tool in the Toolbox.
2. Click with the Button tool on the page. This opens the Button dialog box 51.
3. Enter the width and height for the button.

You can also convert any existing object into a button. This makes it easy to turn images or text into buttons 52.

To convert an object into a button:

1. Select the object that you want to make into a button.
2. Choose Object >Interactive >Convert to Button. The button icon and name appears inside the converted object.

You can also add content, such as text or images, to existing buttons.

To type text in a button:

1. Move the Text tool over the button. The cursor changes to curved edges (53). This indicates that text can be added to the button.
2. Click the Text tool. **A** blinking insertion point indicates that you can type text in the button.

To import text into a button:

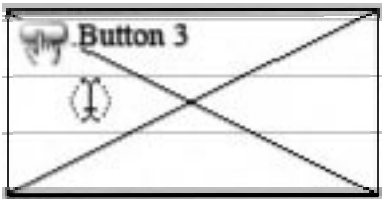
1. Select the button.
2. Choose File >Place and select the text file you want to import. The text flows into the button (54).

TIP The text inside a button is in a separate text frame that has been pasted into the button frame. Use the Direct Selection tool to access the text frame.

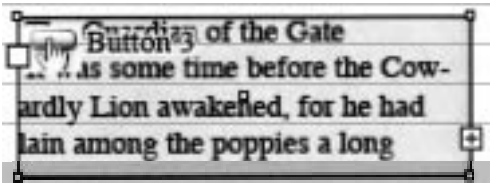
To add an image to a button:

1. Select the button.
2. Choose File >Place and select the text file you want to import. The image appears inside the button (55).

TIP You can also click with a loaded cursor to add an image to a button.

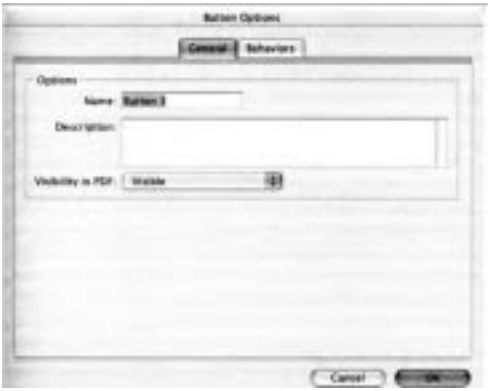


(53) *The* curved text cursor *indicates that you can click to add text to a button.*

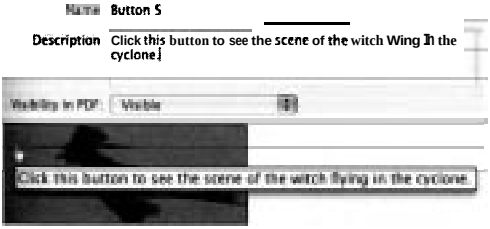


(54) *Text can be imported into a button. The overflow symbol lets you flow the text out to another text frame.*

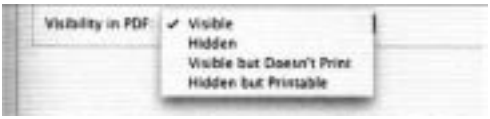
(55) *An image can be imported into a button.*



56 ***The*** Button Options dialog box ***set to the General tab.***



57 ***Enter a description in the General Button Options for the viewer can see while holding the cursor over the button in the PDF viewer.***



58 ***The*** Visibility in ***PDF*** menu ***in the Button Options dialog box.***

General Button Properties

Once you have created a button, you can set its properties. These are divided into two sections. General properties let you name the button and control how it is viewed in the PDF. The other section is the Behavior properties ***(covered on page 409)*** that lets you apply actions to the button.

To set the General controls of the Button Options:

1. Double-click the button to open the Button Options dialog box **56**.

   or

   Select the button and choose Object > Interactive > Button Options.

TIP If you have text in the button, you'll need to use the Object menu command to open it. Otherwise, you'll place an insertion point in the button's text.

2. Click the General tab.
3. Choose a name for the button or leave the default name in place.
4. Enter a description for the button. This description is visible when the mouse passes over the button in Acrobat. It is also used as the alternate text heard by visually-impaired users **57**.
5. Choose one of the following from the Visibility in PDF menu **58**:
   - Visible displays the button. This is the most common setting.
   - Hidden hides the button. This setting can be overridden by the Show/Hide Fields behavior ***(see page 411)***.
   - Visible but Doesn't Print allows the button to be seen but keeps it from cluttering up any printouts of the page.
   - Hidden but Printable allows you to add information to a printout without cluttering up your onscreen page.

Setting the Button States

Part of the fun of using interactive buttons in PDF documents is that you can make the buttons change their appearance when the viewer passes the mouse over them or clicks the button. Each different appearance for the button is called a button ***state***. InDesign lets you add states and control their appearance.

To add button states.

1. If it's not already open, choose Window> **Interactive** >States to open the States palette ⓳.
2. Select the button. Unless you have already modified it, only the Up state is listed in the States palette.
3. Click the New State icon to add the Rollover state.

   or

   Choose New State from the States palette menu.
4. Click the New State icon again to add the Down state.

TIP After you add the Down state, the New State icon is unavailable as there are no other states you can add.

To delete button states.

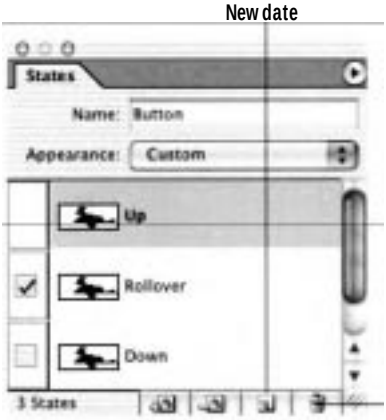
1. Select the state you want to delete.
2. Click the Delete State icon.

   or

   Choose Delete State from the States palette menu.

TIP You cannot delete the Up state.

TIP Instead of deleting states, you may want to use the Enable state setting *(see the next exercise).*



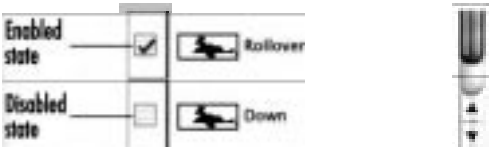
⓳ *Use the* States palette *to add new states to the button display.*

Understanding the States

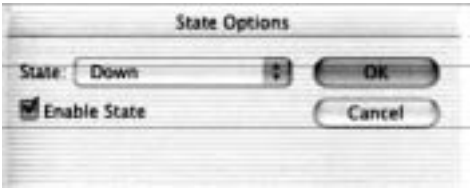
The three button states refer to the appearance of the button in relation to the mouse.

- *Up* refers to the state when the mouse cursor is not near the button. This is also the appearance when the user releases the mouse after clicking the button. Some programs may call this the *Normal* state.
- *Rollover* refers to the state when the mouse cursor passes over the boundaries of the button. Some programs call this the *Over* state.
- *Down* refers to the state when the cursor has been positioned over the button and the mouse button has been pressed.

Other programs may have additional states for their buttons, but Acrobat stops at three.



The check marks next to the state names indicate if the state is enabled or disabled.



The State Options dialog box ***lets you convert states or change their enable setting.***

Instead of deleting states, which tosses out their content, it may be easier to change whether or not the state is exported with the PDF. This is called ***disabling*** the state.

To enable a state:

- Click the **checkbox** next to the name of the state. If the check mark is visible, it means the state is enabled and will export with the PDF.

  or

  Choose State Options and check Enable State in the State Options dialog box.

To disable a state:

- Click the **checkbox** next to the name of the state. If the check mark is not visible, it means the state is disabled and will not export with the PDF.

  or

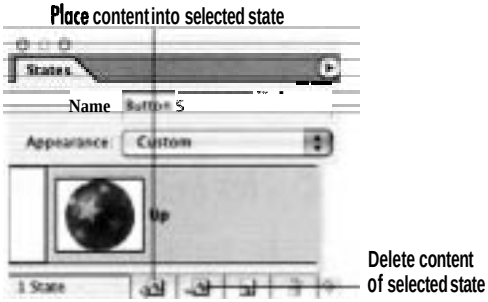
  Choose State Options and uncheck Enable State in the State Options dialog box.

If you have only a Down state or a Rollover state, you can turn one type of state into another.

To convert a state:

1. Select the state you want to convert.
2. Choose State Options from the States palette menu.
3. Use the State menu to change the Down state to Rollover or vice versa.

One of the reasons you want to create button states is so the button changes appearance as the mouse cursor passes over or clicks the button. There are two ways to accomplish this. The first way is to use imported artwork to change the appearance of each state. The second way is to modify the art inside the button using InDesign's effects.



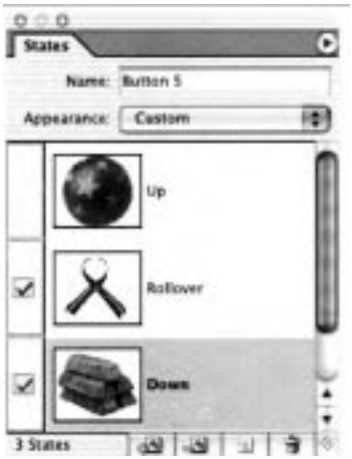
62 *Use the* **States palette** *to change the artwork in button states.*

To create new states using imported artwork:

1. Create a button. The Up state is automatically selected.
2. Click the Place Content into Selected State icon 62. This opens the dialog box that lets you add imported artwork into the Up state.
3. Click the New State icon. This creates a Rollover state that contains the same artwork as the Up state.
4. With the Rollover state selected, click the Place Content into Selected State icon. This changes the artwork in the Rollover state 63.

   or

   Choose Place Content into State from the States palette menu.
5. Click the New State icon to create the Down state.
6. With the Rollover state selected, click the Place Content into Selected State icon. This changes the artwork in the Down state 63.



63 *You can change the artwork from one state to another.*

You can use the commands to place content at any time to modify the appearance of a button state.

To edit button states using imported artwork:

1. Select the button state you want to modify.
2. Click the Place Content into Selected State icon to import new artwork into the button state.

Each one of the states in this button was modified by selecting the text inside the button and making changes.

The second way to change the appearance of a button is to directly select the object inside the button frame.

To change a button state by selecting the object:

1. Select the button you want to modify.
2. Select the state, in the States palette, that you want to modify.
3. Use the Direct Selection tool to select the object inside the button frame.

TIP You will know you're working on the object inside the button when the states disappear from the States palette.

4. Use any of InDesign's styling features to add a fill, stroke, or effect to the object.

TIP You can also use the File >**Place** command to add text or an image to the object inside the button.

You can also delete the artwork from any state.

To delete the content from a button state:

1. Select the state.
2. Click the Delete Content of Select State icon. This deletes all the original artwork as well as any effects that you have applied to the state.

   or

   Choose Delete Content from State from the States palette menu.

You don't have to work too hard to create different appearances for the button states. Adobe has created three appearance themes that you can instantly apply to buttons. The themes'apply different looks to each of the button states.

To apply the appearances to buttons:

1. Select the button.
2. Choose one of the themes from the Appearance menu in the States palette (65):
   - **Bevel** colors the inside of the button and applies a gradient stroke around the edge of the object creating the look of a beveled rectangle (66).
   - Drop Shadow colors the inside of the button and applies a drop shadow to the area inside the button frame (65).
   - Glow applies a multi-colored gradient to the object inside the button (66).

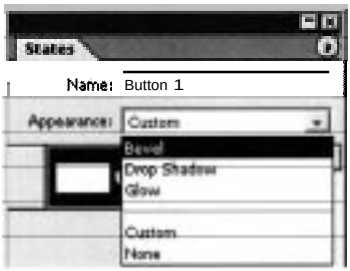
TIP The themes delete any imported images or custom content that was applied to the button states and apply their own styled content.

TIP The appearance themes will delete any non-rectangular shapes from the button.

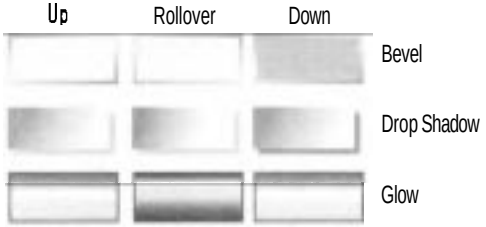
You can modify the appearance themes that you apply to buttons.

To modify the button themes:

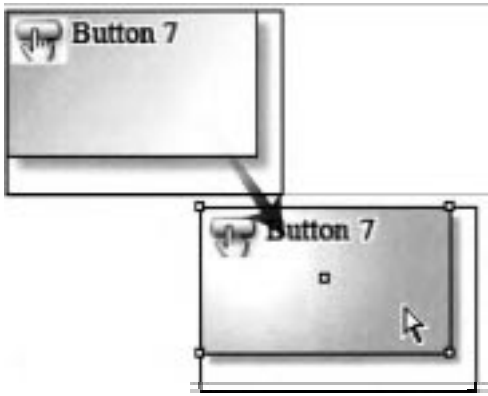
1. Select the button state.
2. Use the Direct Selection tool to select the object inside the button.
3. Use any of the style techniques to change the appearance of the theme (67).



(65) ***Use the*** Appearance menu ***in the States palette to apply preset themes to button states.***

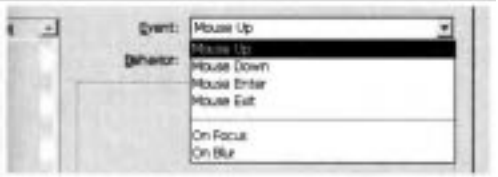


(66) ***The*** appearance themes ***for the button states.***

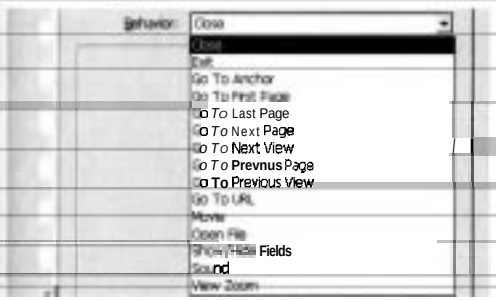


(67) ***Use the Direct Selection tool to*** customize the appearance of a button state. ***Here the Down state of the Drop Shadow theme has been modified by changing the gradient and drop shadow effect.***

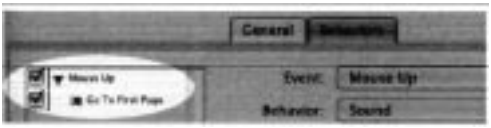
68 *The* Behaviors tab *of the Button Options dialog box.*



69 *The* Events menu *lets you set which mouse trigger applies the behavior.*



70 *The* Behavior menu *lets you set which behavior is applied to the button.*



71 *The* behavior list *shows the events and behaviors that have been applied to the button.*

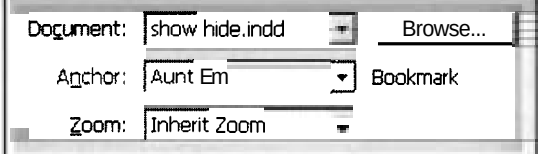
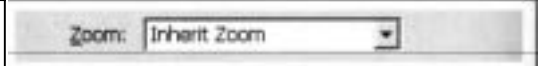
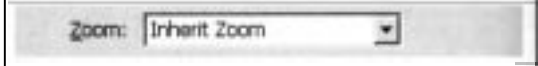
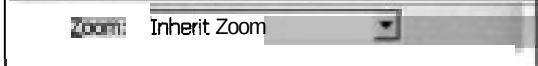
Applying Behaviors

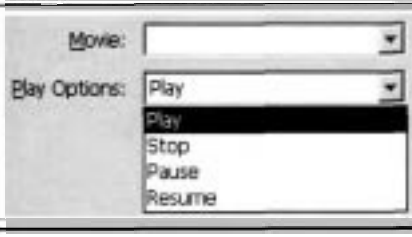
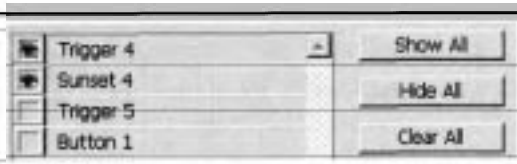
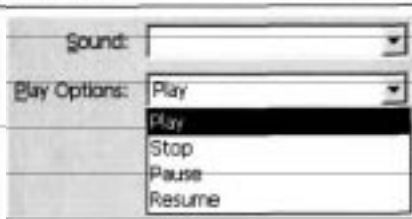
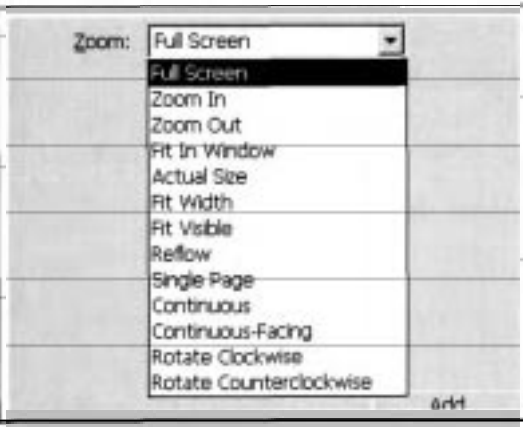
A button without a behavior is like a light switch that is not connected to a lamp. You can flip the button all you want, but nothing changes on the page. Behaviors let your buttons move pages, play movies, or change the appearance of the PDF page.

To apply a behavior to a button:

1. Select the button.
2. Open the Button Options dialog box.
3. Select the Behaviors tab in the Button Options 68.
4. Choose the mouse event that will apply the behavior 69:
   - Mouse Up applies the behavior when the mouse button is released after a click.
   - Mouse Down applies the behavior as the mouse button is pressed down.
   - Mouse Enter applies the behavior when the mouse cursor is moved over the button.
   - Mouse Exit applies the behavior when the mouse cursor is moved away from the button.
   - On Focus applies the behavior when the button is prompted by tabbing through the fields.
   - On Blur applies the behavior when tabbing takes the focus off the button.
5. Choose the behavior from the Behavior menu 70. *(See the chart on the next two pages for a description of each of the behaviors and their settings.)*
6. Depending on the behavior, set any additional controls for the behavior.
7. Click the Add button in the Behaviors panel. The event and behavior appears in the list on the left of the dialog box 71.
8. If desired, you can apply additional behaviors to the button *(see the exercise on page 412)*.

Button Behaviors

Behavior Name	What It Does	Settings
Close	Closes the document.	None
Exit	Exits (quits) the application which displays the PDF document, such as Adobe Reader.	None
Go To Anchor	Moves to a pre-defined destination that can be a text anchor, page or bookmark. Lets you choose the document, destination, and the zoom command.	
Go To First Page	Moves to the first page of the document. Lets you choose the zoom command.	
Go To Last	Moves to the last page of the document. Lets you choose the zoom command.	
Go To Next Page	Moves to the next page of the document. Lets you choose the zoom command.	
Go To Previous View	Moves to whatever document, page, or zoom view was previously chosen.	None
Go To Next View	Only available when the Go To Previous View command was active. Then the command moves forward through the views.	None
Go To Previous Page	Moves to the previous page of the document. Lets you choose the zoom command.	
Go To URL	Opens a Web page or Web command. Lets you type in the URL.	

Behavior Name	What It Does	Settings:
Movie	Controls the play of a movie. Lets you specify the movie and set the play controls.	
Open File	Opens an external file that does not have to be a PDF document. Viewer must have the application that created the file. You must specify the full path to open the file.	
Show/Hide Fields	Displays the fields in the document and lets you set them to be hidden or visible by the action of the button.	
Sound	Controls the play of a sound clip. Lets you specify the sound and set the play controls.	
View Zoom	Lets you change the level of zoom as well as change the layout options such as Continuous and Continuous-Facing.	

Applying Behaviors (continued)

The most sophisticated buttons are those that apply multiple behaviors. You can apply multiple behaviors to the same mouse event or to separate mouse events.

To apply multiple behaviors to a button:

1. Select the button and open the Button Options dialog box.
2. Select the Behaviors tab.
3. Choose the event and behavior settings and then click the Add button. The behavior appears in the list on the left side of the dialog box.
4. Choose an additional event and behavior settings and click the Add button.

TIP If the behavior uses the same event as the first, it appears nested under the event name. If the behavior uses a different event, it appears under that event name ⓬.

To edit existing behaviors:

1. Choose the behavior in the behavior list that you want to edit.
2. Make whatever changes you want to the behavior settings.
3. Click the Update button

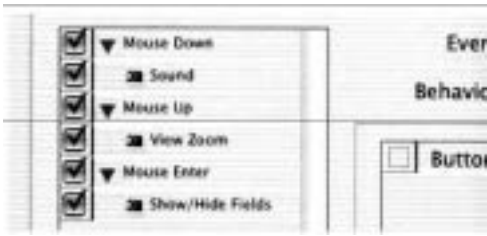
TIP The Update button replaces the Add button when you edit existing behaviors.

To change the position of a behavior:

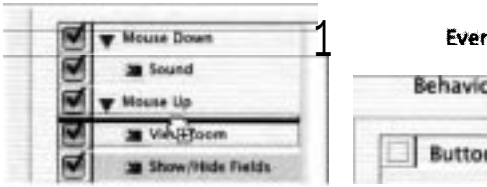
- Drag the behavior up or down in the behaviors list ⓭. The behaviors are applied in the order that they appear in the list.

To change the event associated with a behavior:

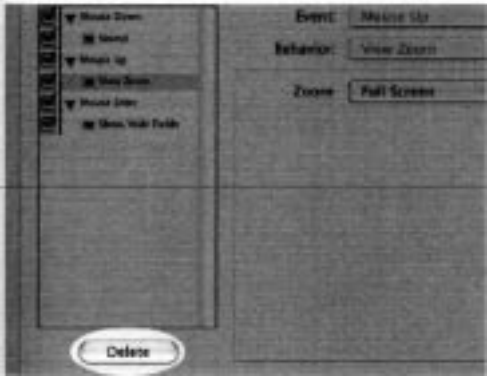
- Drag the behavior from one event to another in the behaviors list.



⓬ **Multiple behaviors** *appear in the behaviors list.*



⓭ *You can* **drag a behavior** *to a new position or to a different event.*



74 *The* Delete Button *lets you delete behaviors or events from the behaviors list.*

75 *Click the check mark next to a behavior or an event to* deactivate the behavior or event.

Deleting or Deactivating Behaviors

You may have applied a behavior that you no longer want applied to the button. Fortunately you can delete behaviors from the button.

To delete a behavior:

1. Select the behavior in the behaviors list that you want to delete.
2. Click the Delete button. The behavior will be deleted from the behaviors list 74.

TIP If that behavior was the only one listed for the event, the event will also be deleted from the list.

Instead of deleting behaviors which you have so carefully defined, you can deactivate them so they are still in the behaviors list but don't get applied to the final PDF. You can also deactivate all the behaviors under a mouse event.

To deactivate a behavior or mouse event:

1. Select the behavior or the mouse event in the behaviors list.
2. Click the checkbox next to the behavior of the event 75. This deactivates the behavior from the exported PDF.

Creating a Multimedia Interactive PDF Page

Buttons can do more than play one behavior at a time. So, a single button can play a media clip at the same time it shows one button image and hides another.

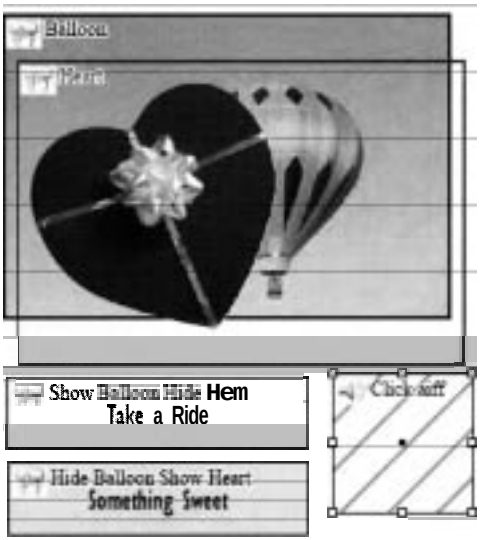
This project shows how you can combine the Show/Hide Fields command together with a sound file to create an interactive, multimedia PDF page. In this project two buttons will be used to show and hide two different images. Also, a click sound effect will be applied when the buttons are pressed.

One of the main benefits in creating this project in InDesign, rather than Acrobat, is that we have better control over the position of the images that are shown and hidden. We also have much better tools for applying labels and effects to the buttons.

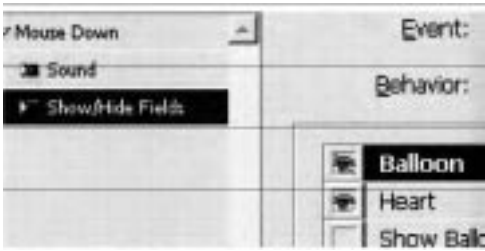
We started by creating the following items on the page 76:

- A button labeled *Heart* that displays the image of the heart.
- A button labeled *Balloon*, positioned over the previous one, that displays the image of a balloon. Although it wasn't necessary for the final effect, we positioned this image on a layer above the other to make it easier to work with.
- A button, with three states, labeled *Show Balloon Hide Heart.*
- A button, with three states, labeled *Hide Balloon Show Heart.*
- A sound clip that contains a *click.aiff* sound file. We chose no poster option for the sound clip so it would not be visible in the final PDF document.

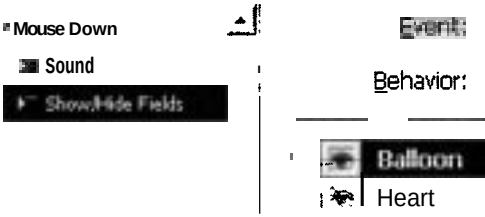
We then selected the Show Balloon Hide Heart button and open the Behaviors tab in the Button Options dialog box.



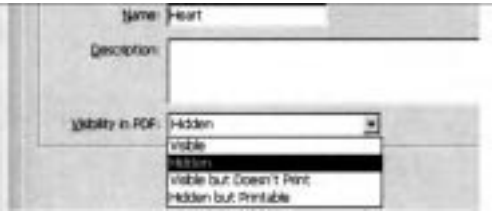
76 *The elements used in the multimedia interactive PDF project.*



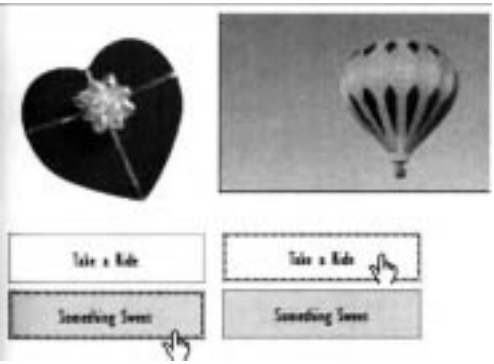
77 *The multiple behaviors applied to a button. On Mouse Down, the behaviors here play the sound and hide the balloon image and show the heart.*



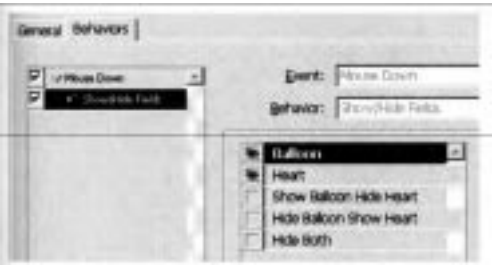
78 *The multiple behaviors applied to a button. On Mouse Down, the behaviors here play the sound and show the balloon image and hide the heart.*



78 ***The*** Hidden setting for the Visibility in PDF ***ensured that the two images were hidden when the PDF was first opened.***



79 ***Clicking each button showed one image and hid the other.***



80 ***A fifth button, called Hide Both, allowed us to hide both the Balloon and Heart buttons.***

We chose Mouse Down from the Events menu. We then chose Sound from the Behaviors menu and chose the click.aiff sound to play. We also chose the Show/Hide Field behavior for Mouse Down. We set it to show the Heart image but hide the Balloon image **77**.

We then selected the Hide Balloon Show Heart button and opened the Behaviors tab in its Button Options dialog box. In addition to setting the click.aiff sound to play, we used the Show/Hide Field behavior to Hide the heart image but show the balloon image **78**.

We didn't need to set any behaviors for the Heart button or the Balloon button since they would be used only for display. But we did need to set their Visibility in PDF setting to hidden in the General tab area of the Button Options **78**. This was to ensure that the two buttons (used as images, but called buttons) would be hidden when the PDF document was first opened.

We then exported the project as an Acrobat *6* file. We made sure to check the Interactive Elements setting in the final file. In Acrobat each button played a sound as well as showed one image and hid the other **79**. Although you can use Acrobat 6 to edit the button behaviors created by InDesign, you can't edit the Up, Down, or Rollover appearances.

Finally, after testing in Acrobat, we realized we needed a way to reset both images to the hidden state. So we created another button called *Hide Both* and applied the Show/Hide Fields behavior to hide both images **81**.

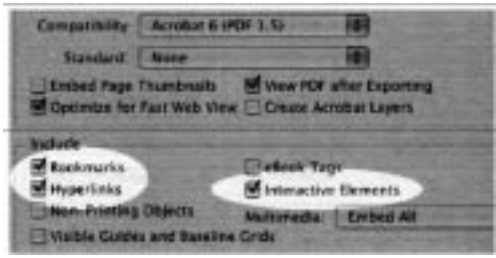
We then re-exported the project as a PDF. We were able to use the Acrobat file on either the Mac or Windows platforms.

Exporting Interactive PDFs

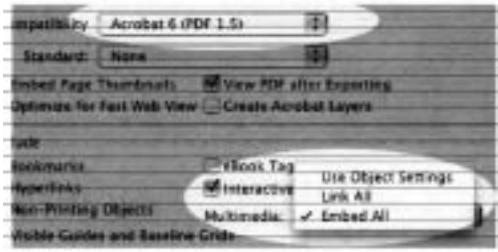
There are a few settings you must be aware of when exporting interactive and multimedia PDFs from InDesign. *(See Chapter* 19, *"Exporting" for the complete instructions on exporting PDF files from InDesign.)*

To set the interactive/multimedia export controls:

1. Choose **File** >Export and then choose Adobe PDF for the format.
2. Check Bookmarks, Hyperlinks, and Interactive Elements to make sure they are part of the final PDF document (82).
3. If you want to embed a movie clip within the file, you must save the document as an Acrobat 6 (PDF 1.5) (83).
4. If you have chosen Acrobat 6, the Multimedia menu is available (84). This lets you override the object embed settings.



(82) *Remember to include* Bookmarks, Hyperlinks, and Interactive Elements *when you export the PDF document.*



(83) *You must save as an Acrobat 6 (PDF* ***1.5)*** *in order to be able to embed all media clips in the exported PDF.*

18 OUTPUT

Several years ago the title of this chapter would have been Printing. That was what you did with page-layout documents: You printed them using a desktop printer. Today, however, there are many more choices for publishing your InDesign documents.

Most InDesign files are created as part of the professional prepress process. (For more information on professional printing, see The Non-Designer's Scan and Print Book by Sandee Cohen and Robin Williams published by Peachpit Press.) You need to know more than just how to print to a desktop printer. You need to know how to make sure your document has been setup correctly. You need to know what files are necessary to send to a print shop.

So this chapter is called Output. Output refers to preparing documents and printing them—either with an ordinary desktop printer or with a high-end printing device such as an imagesetter.

Printing a Document

When a document is printed, there are many different instructions that are sent to the printer. You need to set all those instructions correctly.

TIP Adobe recommends using only the controls inside the InDesign Print dialog box — not the Page Setup (Mac) dialog box or the Printer Properties (Win) dialog box.

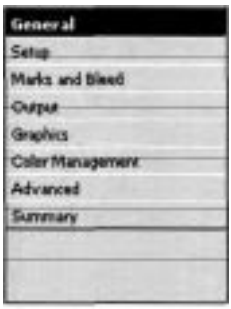
To print a document:

1. Choose File >**Print.** This opens the Print dialog box ❶.
2. Click each of the categories ❷ on the left side of the dialog box to set the options as described in the chart on the following page.

TIP You do not need to set all the controls every time you print unless you need to change a specific setting.

3. Click the Print button to print the document according to the settings.

❶ *The* Print **dialog box** *contains all the settings for printing documents.*



❷ *Click each of the categories to display those settings in the Print dialog box.*

Before you print a document, you may want to set some-objects (such as private notes or alternate designs) to not print.

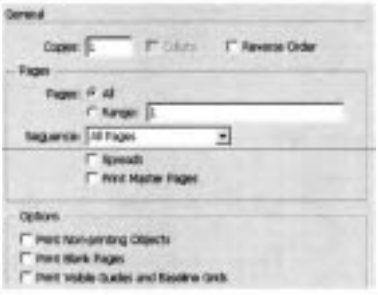
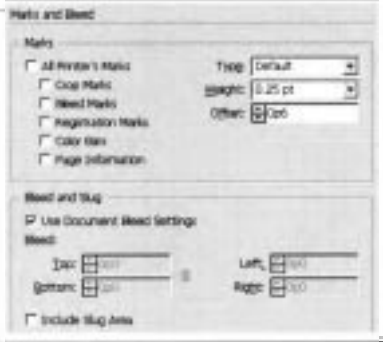
To set elements not to print:

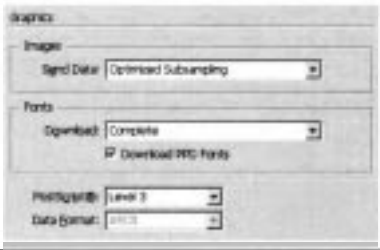
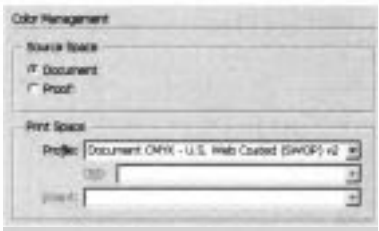
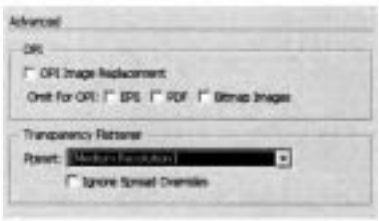
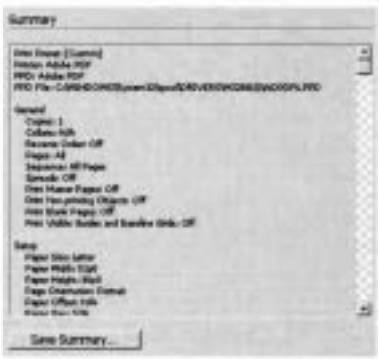
- Select the object and turn on Nonprinting in the Attributes palette *(see page 136)*.

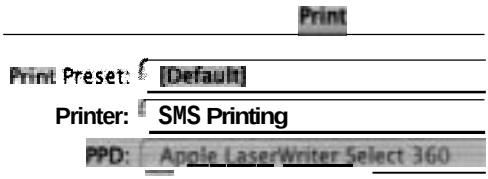
  or

  Turn off the visibility of the layer in the document *(see page 269)*. This supresses the printing for all objects on the layer:

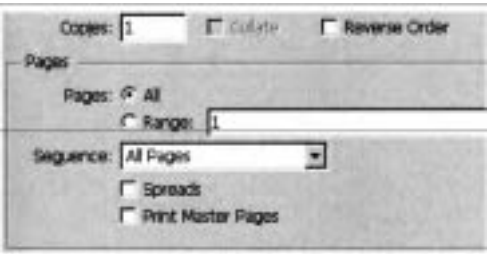
Print Dialog Box Categories

Print Category	Settings	Comment
General		**Sets the basic printing options** *(see page 421)*.
Setup		**Controls the dimensions of the printable area** *(see page 422)*.
Marks and Bleed		**Sets the print control marks and print area** *(see page 425)*.
Output		**Controls colors and separations** *(see page 427)*.

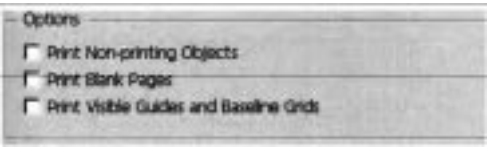
Print Category	Settings	Comment
Graphics		**Sets how images are printed** *(see page 434)*.
Color Management		**Controls how colors are handled. (Talk to your service bureau before setting color management controls.)**
Advanced		**Controls image replacement options and how transparency effects are printed** *(see page 435)*.
Summary		**Lets you see a summary of all the print settings** *(see page* **442).**



❸ *The* Printer list *lets you choose the printer to print a document.*



❹ *The* Copies and Pages area *of the General controls for printing.*



❺ *The* Options area *of the General controls for printing.*

Setting the General Print Options

If you are printing to a desktop printer, the options in the General category may be **all** you need to set to print a document.

To choose the printer:

- Choose the printer from the Printer list at the top of the dialog box ❸.

To control the copies:

1. Set the number of copies in the Copies field ❹.
2. Choose Collate to print multiple copies as complete sets.
3. Choose Reverse Order to print the copies back to front.

TIP Use Reverse Order for printers that print documents face up.

To control the pages:

1. Choose All to print **all** the pages ❹.

   or

   Select Range to enter a range of pages.

TIP Use a hyphen to specify a range of pages, such as 4-6. Use a comma to specify individual pages, such as *8, 9.*

2. Choose Collate to print copies as sets.
3. Use the Sequence menu to choose All Pages, Even Pages, or Odd Pages.
4. Check Spread to print the pages in spreads together.
5. Choose Print Master Pages to print any master pages in the document.

To set the general options:

1. Check Print Non-printing Objects to print objects set to not print ❺.
2. Check Print Blank Pages to print pages that have no visible items.
3. Check Print Visible Guides and Baseline Grids to print the guides and grids.

Choosing the Setup Controls

The Setup options contain the controls to set the paper size and orientation.

To set the paper size and orientation:

1. Use the Paper Size menu to choose the sue of the paper to print the document on ❻.

TIP This menu changes depending on the type of printer chosen.

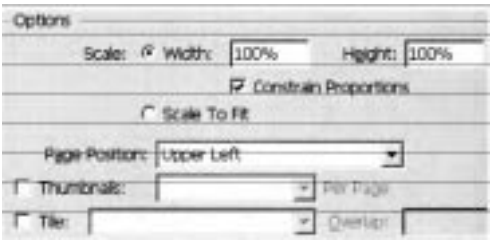
2. Click one of the Orientation buttons. This changes the rotation of the document on the printed page.

To choose the setup options:

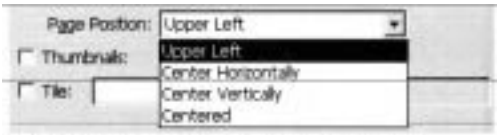
1. Set the Scale amount for either Height or Width to change the sue of the printed document on the paper ❼.
2. Click the Scale to Fit button to have the document automatically resized to fit the chosen paper size.
3. Use the Page Position menu to choose where to position the document on the printed page ❽.
4. Check Thumbnails to print small versions of the pages on a single page.
5. If you have chosen Thumbnails, use the Thumbnails menu to choose how many pages are printed on each page ❾.

TIP See the next exercises for information on how to use the Tile controls.

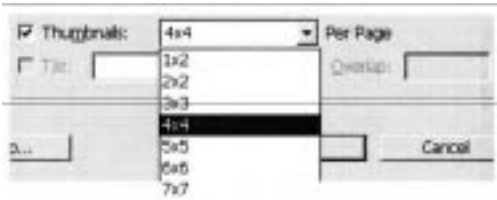
❻ *The* Paper Size and Orientation controls *in the Setup category of the Print dialog box.*



❼ *The* Options controls *in the Setup category of the Print dialog box.*

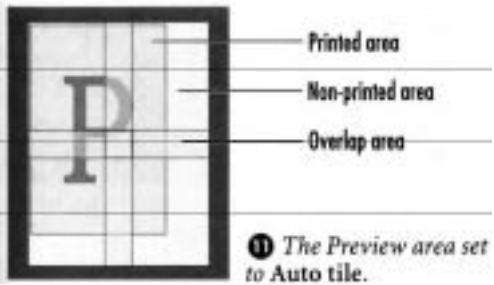


❽ *The* Page Position menu *in the Setup category of the Print dialog box.*

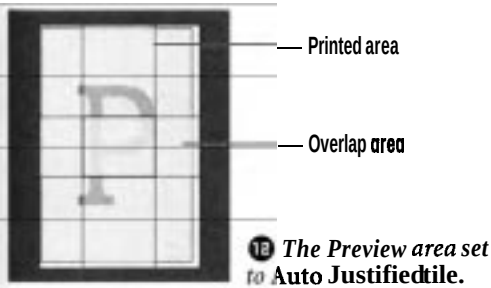


❾ *The* Thumbnails menu *in the Setup category of the Print dialog box.*

⓾ *The* **Tile menu** *in the Setup category of the Print dialog box.*



⓫ *The Preview area set to* **Auto tile.**



⓬ *The Preview area set to* **Auto Justified tile.**

Tiling Pages

If your document is larger than the paper in the printer, you can print portions of the document on different pages. You can then assemble the pages together. This is called *tiling.* Auto tiling automatically divides the page into smaller segments.

To set automatic tiling:

1. Check Tile in the Setup category of the Print dialog box.
2. Choose Auto from the Tiling menu ⓾.
3. Set the amount in the Overlap field. This controls how much of one page is repeated on the tile for a second section of the page.

TIP The Preview area in the lower left portion of the Print dialog box shows how the page will be tiled ⓫.

Auto justified tiling divides the pages so that the right edge of the document lies on the right side of a printed page and the bottom edge of the document lies on the bottom edge of a printed page ⓬.

TIP The Auto setting ensures that there are no white spaces on the right side and bottom of the tiled pages.

To set auto justified tiling:

1. Check Tile in the Setup category of the Print dialog box.
2. Choose Auto Justified from the Tiling menu.

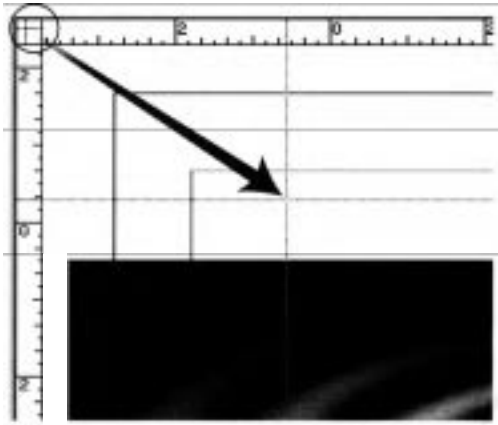
You can also tile pages manually. This lets you make sure that the edge of the paper does not cut across an important portion of the document.

To set manual tiling:

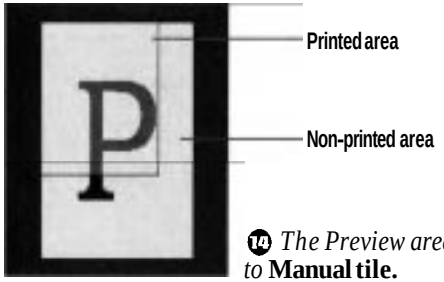
1. Use the zero-point crosshairs on the ruler to set the upper-left corner of the area you want to print ⓭. *(See Chapter 2, "Document Setup," for more information on setting the zero point of the ruler.)*
2. Choose File >**Print.**
3. Click the Setup category of the Print dialog box.
4. Choose Manual from the Tiling menu.

TIP The Preview area of the Print dialog box shows the area that will be printed ⓮.

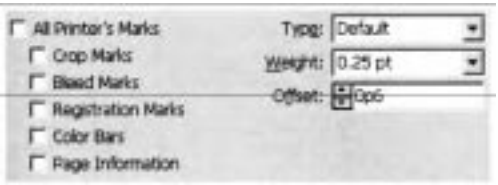
5. Click Print to print that one page.
6. Reposition the zero-point crosshairs to set a new area to be printed.
7. Follow steps 2 through 5 to define and print the second tile.
8. Repeat the process until the entire page has been printed.



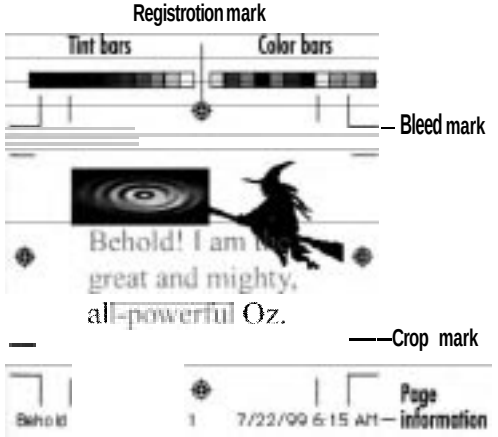
⓭ **Move the zero-point crosshairs** *to set the area to print as a tile on one page.*



⓮ *The Preview area set to* **Manual tile.**



⓯ *The* Marks settings *in the Marks and Bleed category of the Print dialog box.*



⓰ *The* page marks and information *as they appear on the printed page.*

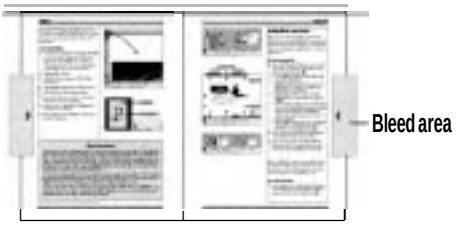
Setting Marks and Bleed

You can also add information that shows where the page is to be trimmed, the document name, and so on. This information is sometimes called ***printer's marks*** or ***page marks.***

To set the page marks:

1. Check All Printer's Marks to turn on all the marks or use the checkboxes to set each one individually ⓯ and ⓰.
   - Crop Marks indicates where the page should be trimmed.
   - Bleed Marks shows how far outside the crop marks you must put graphics so that they are trimmed correctly.
   - Registration Marks adds crosshair targets that are used to line up pieces of film.
   - Color Bars provides boxes that display the colors used in the document as well as the tint bars that can be used to calibrate the printing press for correct tints of colors.
   - Page Information prints the name of the file, page number, and time the document was printed.
2. Use the Type menu to choose a custom set of marks such as those used in Japanese printing.
3. Enter an amount in the Weight field for the thickness for the crop marks.
4. Enter an amount in the Offset field to determine how far away from the trim the page marks should be positioned.

You can also control the bleed, or the area that allows objects that extend off the page to print ⓱.



⓱ *An example of creating an object that bleeds off page.*

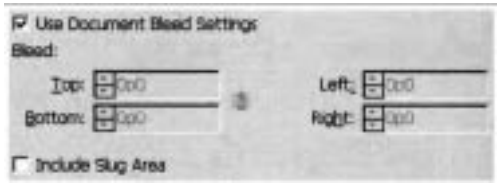
To set the bleed area:

- To use the bleed set in the Document Setup dialog box *(see page 19)*, check Use Document Bleed Settings ⓲.

  or

  Deselect Use Document Bleed settings and then set the custom amounts for the bleed around each side of the page ⓳.

TIP These custom bleed controls make it easy for print shops and to set a uniform bleed as part of a print preset *(see page* 441).

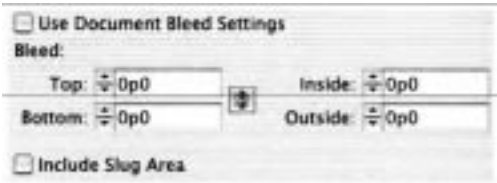


⓲ *Check the option for* Use Document Bleed Setup *to have the bleed use the same settings as in the Document Setup dialog box.*

If you have set a slug for the document *(see page 19)*, you can choose if that slug area prints.

To set the slug area:

- To print items in the slug area, check Include Slug Area.



⓳ *The* Bleed controls *allow you to define a custom bleed in the Print dialog box.*

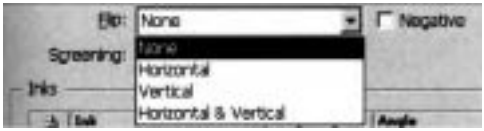
Why Do We Need To Bleed?

Why do you need to position objects so they bleed off the page layout? The reason is that the machines that trim books and pages don't always cut perfectly. Take a look at the thumbtabs on the sides of this book. If you flip from page to page you will see that the gray area isn't always the same size. That's because when the paper for the book is trimmed, some of the pages are cut slightly different from the others. (Yes, I know this will happen, even before the book is printed.)

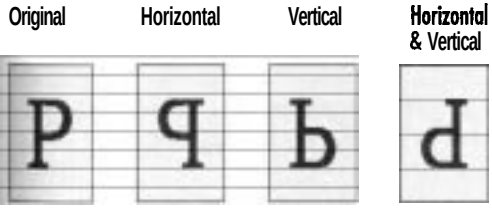
So instead of trusting that the trim position is always perfect, I set a bleed by extending the gray area outside the edge of the page. That way I don't have to worry if the trim is slightly off. I know that the gray area will still be visible outside the trim.

Unless your print shop is trying to trim pages in the middle of an earthquake, you shouldn't need more than a quarter-inch bleed. However, if you are in doubt, ask your print shop for the size they would like for a bleed.

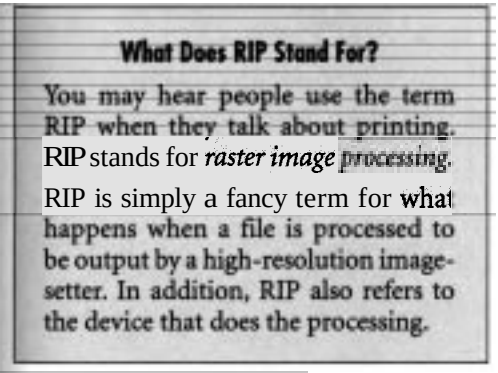
21 ***The* Color menu *in the Output category of the Print dialog box.***



22 ***The* Flip menu *in the Output category of the Print dialog box.***



23 ***Examples of how the* Flip menu *changes the readability of a document.***



What Does RIP Stand For?

You may hear people use the term RIP when they talk about printing. RIP stands for *raster image processing*.

RIP is simply a fancy term for what happens when a file is processed to be output by a high-resolution imagesetter. In addition, RIP also refers to the device that does the processing.

Setting the Output Controls

You may need to set the color controls to choose how color documents are printed.

To control how colors are printed:

1. Choose one of the following from the Color menu **21**:
   - Composite Leave Unchanged prints without converting colors to either RGB or CMYK.
   - Composite **Gray** prints all the colors as a gray image. Use this when printing on one-color laser printers.
   - Composite **RGB** prints all the colors as an RGB image. Use this when printing on RGB ink-jet printers.
   - Composite **CMYK** prints all the colors as a CMYK image. Use this when printing on Postscript CMYK printers.
   - Separations prints all the colors onto separate plates or pages.
   - In-RIP Separations prints all the colors onto separate plates using the separation controls in the RIP.

TIP Separations printed on a laser printer are commonly called ***paper separations*** and are used to make sure the proper number of plates will be printed by the service bureau.

2. If you choose one of the composite settings, you can check Text as Black.

TIP The Text as Black command is helpful if you have color text that you want to be more readable when printed on a one-color printer.

3. Use the Flip menu if you need to flip the orientation of the page **21** and **22**.
4. Check the Negative box in the Output category of the Print dialog box.

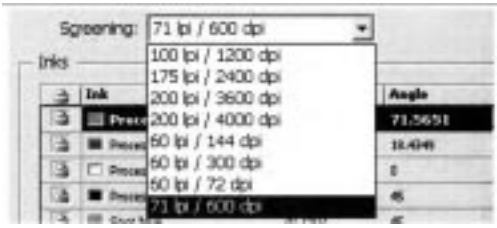
TIP These last two options are not commonly used for desktop printers, but are used by print shops when they create film separations.

You can also change the screen frequency and angle of halftones in the image.

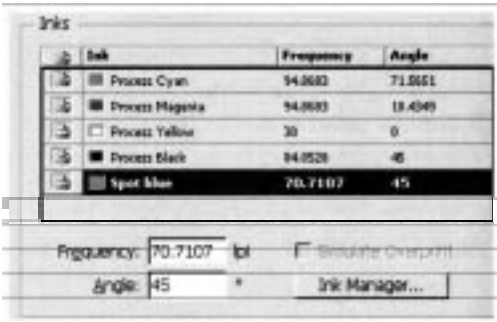
To change the screen settings:

1. Use the Screening menu to set the frequency and angle for the screen applied to images ㉓.
2. Select a color in the Inks area and then use Frequency and Angle fields ㉔.

TIP Always talk to your Print Service Provider for the correct settings.



㉓ *The* **Screening menu** *in the Output category of the Print dialog box.*

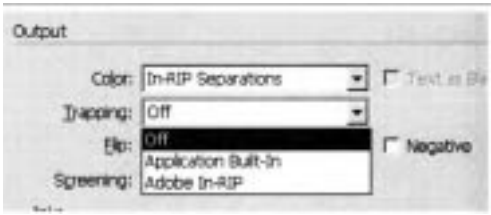


㉔ *The* **Frequency and Angle fields** *in the Output category of the Print dialog box.*

Trapping refers to the various techniques that are used to compensate for the misregistration of printing plates. However, if you don't understand trapping, you must consult with the service bureau that will print your file before you set the trapping.

To turn on basic trapping:

- Choose Application Built-in or Adobe In-RIP from the Trapping menu @.



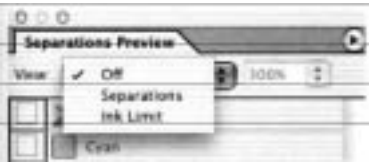
@ *The* **Trapping menu** *in the Output category of the Print dialog box.*

Setting Traps

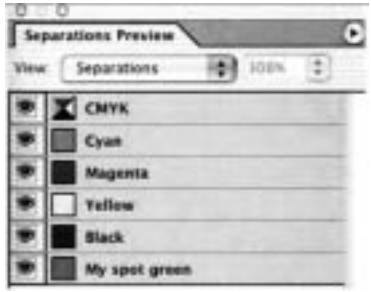
Trapping is like buying a boat. If you have to ask the price of a boat, you can't afford it. If you have to ask what trapping is, you shouldn't do it.

If a service bureau asks you turn on trapping, they should give you information about how to set the traps.

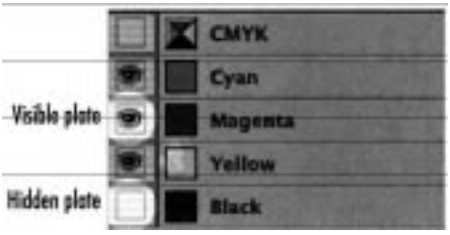
Don't be afraid to ask for the information. You're not expected to know what values to enter, but you'll look pretty smart if you do ask.



Use the View menu *in the Separations Preview palette to turn on the separations preview.*



The colors in the document *are displayed in the Separations Preview palette.*



Click the Show/Hide icons *in the Separations Preview palette to change the display of the colors on the page.*

Working with Separations Preview

When a document is printed with more than one color, each color is called a plate. Printing the different colors onto separate plates is called making separations. You use the Separations Preview palette to view the different color plates onscreen. This makes it possible to see or gauge adjust how a document will look on press.

To turn on separations preview:

1. Choose Window>Output Preview> Separations. The Separations Preview palette appears.
2. Choose Separations from the View menu . This displays the controls for the colors in the document .
3. Click each Show/Hide icon next to the color name to change the display of the colors on the page . *(See the chart on the followingpage for examples of the previews.)*

TIP Click the Show/Hide icon next to the CMYK listing to show or hide all those plates together.

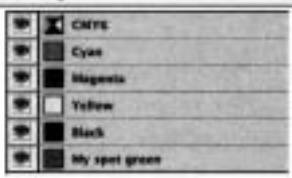
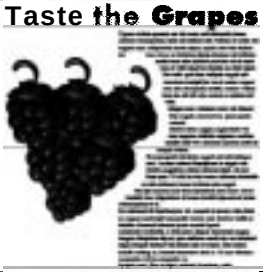
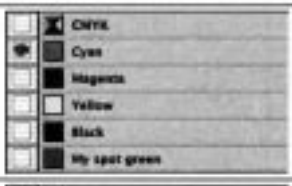
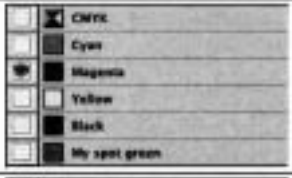
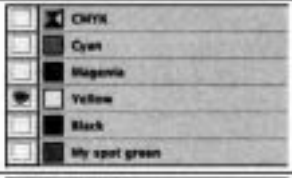
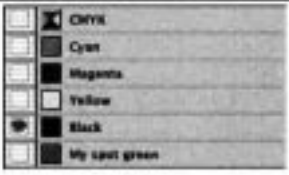
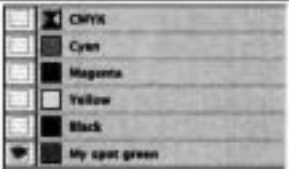
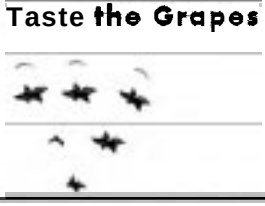
My Favorite Childhood Book

One of my favorite books I had as a kid was a *World Book Encyclopedia* that had acetate pages that you could flip to see how colors built up to a full-color image. (It's true! At the age of thirteen I was into page production and color separations.)

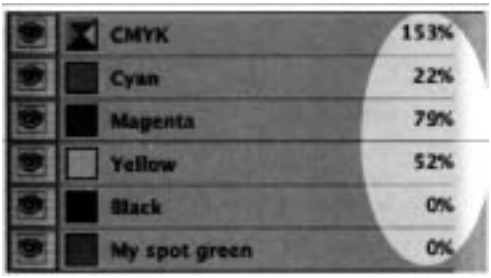
When I worked in advertising we called these color breakdowns *prog proofs* (for progressive proofs). But for many years of working with computer graphics, there was no way to see how colors combine on the page. The best we used to do was print color on individual laser prints and then hold them up to the window to see how the colors would separate.

Finally, I am thrilled to see the Separation Preview—an electronic version of my *World Book* acetate pages. Instead of flipping pages, I click colors on and off. I can spend hours doing it. It makes me feel like a kid again!

Separation Preview Plate Settings

Plate	Palette setting	Onscreen Preview
All		
Cyan		
Magenta		
Yellow		
Black		
My spot green		

As you change the colors shown in the Separation Previewpalette, the display of the colors on the page changes.

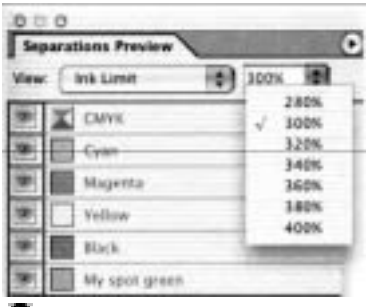


Click the **panel menu icon** *to open the menu for the active panel.*

The Separations Preview palette also lets you view the total amount of **ink** for each plate.

To view the inks for each plate:

1. Choose Separations Preview from the View menu.
2. Move the cursor around the page. The ink percentages appear next to the name of each color .



Click the **panel menu icon** *to open the menu for the active panel.*

Separations Preview also shows you the areas of the page that exceed a certain ink limit. For instance, many print shops will request that you not define colors totaling more than 300% of all the inks combined. The Ink Limit setting lets you see if there are any areas that exceed this limit.

To check the ink limit:

1. Select Ink Limit from the View menu in the Separations Preview palette.
2. Use the amount menu to set the ink limit amount .

TIP When you switch to the Ink Limit view, the document preview changes to a grayscale image. Any areas that exceed the ink limit are shown in red. The deeper the red, the more the color is over the **ink** limit.

TIP You can also enter your own custom amount in the Ink Limit field.

Color Separations and Ink Manager

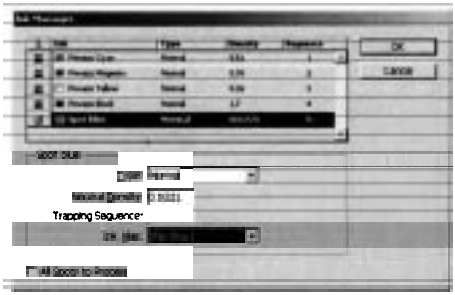
The Inks area of the Output category also lets you control how the inks are separated and printed.

32 *The* printer icon next to an ink color *indicates if that ink willprint or not.*

To set the inks to be printed:

- Click the printer icon next to the name of each color. Each click changes how the ink will print as follows 32:
  - If the icon is visible, the color will print.
  - If there is a slash through the icon, the color will not print.

Sometimes you find yourself with a document that contains spot colors that should be process colors. The Ink Manager lets you convert the spot colors to process inks.



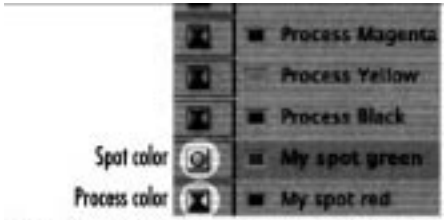
33 *The* Ink Manager dialog box *gives you control over how inks are separated orprinted.*

To convert spot colors to process:

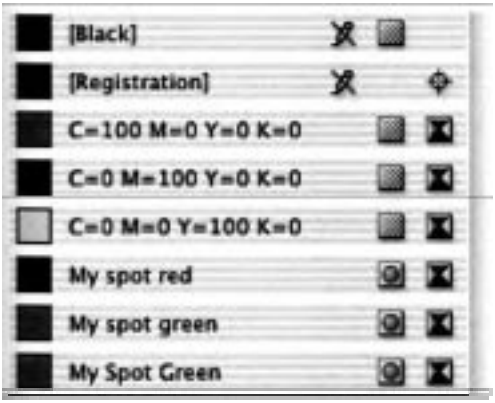
1. Open the Ink Manager by clicking the Ink Manager button in the Output area of the Print dialog box 33.

TIP You can also open the Ink Manager from the Swatches palette menu or the Separations Preview palette menu.

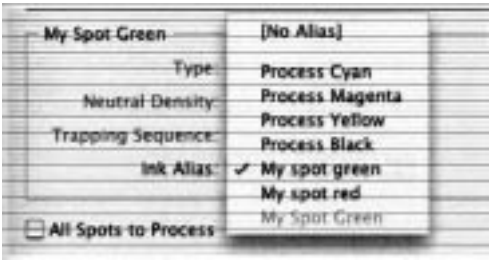
2. Click the color icon next to the name of each color. Each click changes how the ink will print as follows 34:
   - A CMYK symbol indicates that the color will separate as a process color.
   - A spot color symbol indicates that the color will separate on its own plate.
3. Click the *All* Spots to Process option to convert **all** spot colors to process.



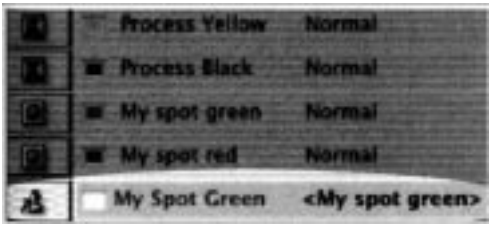
34 *Click the* color icons *in the Ink Manager to convert spot colors to process.*



35 ***An example of how names typed in different cases can create*** too many spot colors ***in a document.***



36 ***Use the*** Ink Alias menu ***to have one color map to a different one.***



37 ***An example of how*** one color is used as the alias ***for another.***

When you import artwork that contains spot colors, those spot colors are added to the document and the Swatches palette. There are no problems if the imported colors are named exactly the same as existing colors. But if the name of the imported color differs from the color you have defined, you can wind up with two separate color plates instead of one **35**. Thankfully, InDesign lets you map one color to be an alias of another.

To map one color to be the alias of another:

1. Select the color you want to change in the Ink Manager.
2. Use the Ink Alias menu to choose a different color to map to the selected one **36**. The color is listed in the Ink Manager as mapped to the other color **37**.

TIP You can map the selected color to a spot or process color.

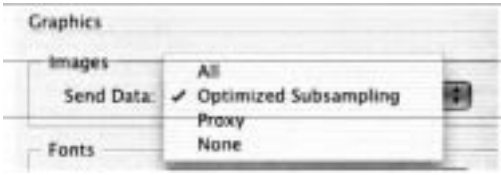
TIP Colors that are mapped to another color are not listed in the Inks area of the Output category. They are also not listed in the Separations Preview palette.

Setting the Graphics Options

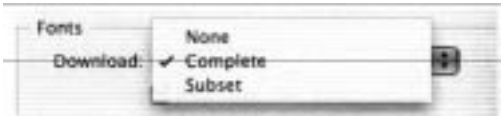
The Graphics options control how much information is sent to the printer. You can control the data that is sent for placed images.

To control the data sent for images:

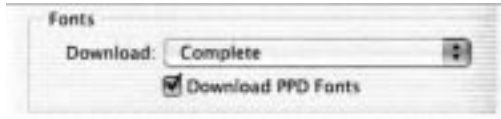
- Choose one of the following from the Image Send Data menu (38):
  - ***All*** sends all the information for the graphics. This is the slowest setting.
  - Optimized Subsampling sends only the amount of information necessary for the chosen output device. Use this option if you're proofing high-resolution images on a desktop printer.
  - Proxy sends only a 72-ppi version of the image.
  - None replaces the image with crosshairs within the frame. Use this option when you want to proof only the text in the file.



(38) *Use the* Send Data menu *in the Graphics category to control how images are printed.*



(39) *Use the* Download menu *in the Graphics category to control how much of a font is sent to the printer.*

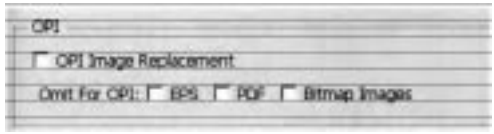


(40) *Choose* Download *PPD* Fonts *to send printer fonts as part of the print information.*

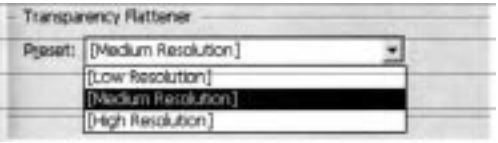
You can also control how much of the font information is sent to the printer.

To control the font information sent for printing:

1. Choose one of the following from the Download menu (39):
   - None sends no font information, only a reference to the font. Do not use this option unless you understand how to replace the reference in the Postscript data stream.
   - Complete sends the entire set of glyphs for the font. This is the longest option.
   - Subset sends only those glyphs used in the document.
2. Choose Download PPD Fonts to send all fonts, even if they have been installed on the printer (40). This option is helpful if you use a variation of the fonts installed on the printer.



41 ***Set the*** OPI Image Replacement options ***to control how images are handled duringprepress.***



42 ***Use the*** Preset menu ***in the Transparency Flattener area to set the resolution for transparency effects that create rasterized images.***

Setting the Advanced Options

The Advanced category lets you set the options for OPI and choose a transparency preset. ***OPI*** stands for ***Open Prepress Interface.*** The OPI controls are used when files are sent to Scitex and Kodak prepress systems.

To set the OPI controls:

1. In the OPI area, click the OPI Image Replacement checkbox 41.
2. Choose which types of images should be replaced during an OPI workflow. **(An** OPI workflow uses low-resolution images for the layout and swaps them with high-resolution images just before printing.)

When you use any of the transparency features, InDesign needs to flatten or convert those effects into vector and raster images as they are sent for output. The Transparency Flattener section of the Advanced category controls how InDesign flattens the image.

To set the flattener preset:

1. Use the Preset menu to choose one of the flattener settings 42. ***(See the next section for what these settings mean.)***
2. If you have used the Pages palette to flatten individual spreads, you can check Ignore Spread Overrides to override that setting. This means that the setting you choose in this dialog box will be used no matter what flattener settings you have applied to the individual pages.

Flattener Presets and Preview

The transparency flattener presets control how the transparency effects, drop shadows, and feathers are handled during output. The three default presets cannot be edited, but you can create your own flattener preset.

To create a transparency flattener preset:

1. Choose Edit >Transparency Flattener Presets. This opens the Transparency Flattener Presets dialog box (43).
2. Click the New button. The Transparency Flattener Preset Options dialog box appears (44).
3. Use the Name field to name the preset.
4. In the Options area, move the Raster/Vector Balance slider to create more vector or more rasterized artwork (45).
5. Set an output resolution for rasterized artwork in the Flattener Resolution field.

TIP 300 dpi is sufficient for most output.

6. Set an output resolution for gradient objects in the Gradient and Mesh Resolution field.

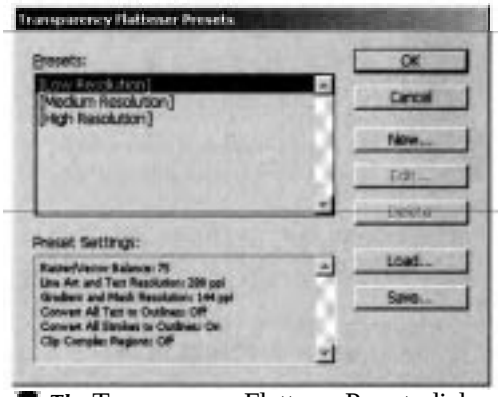
TIP 150 dpi is sufficient for most gradients.

7. Check Force Text to Outlines to convert **all** text to outlines.

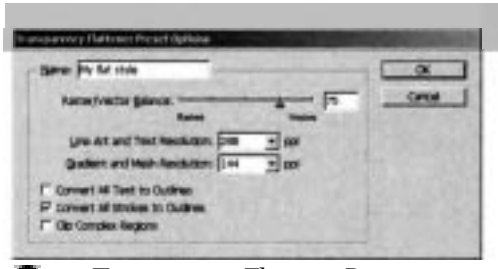
TIP If this is not checked only transparent portions of the text may be converted to outlines, which may make that text thicker than other text. This option makes the text width consistent.

8. If you have strokes that pass through different transparencies, you may want to choose Convert Strokes to Outlines to convert **all** strokes to outlines.
9. Check Clip Complex Regions to ensure that any differences in raster and vector objects always fall along existing paths.

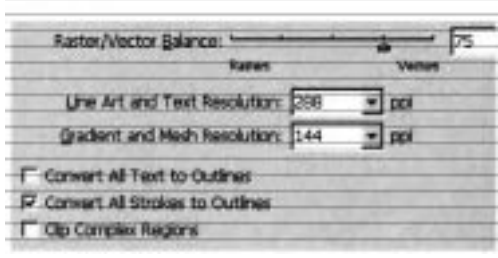
TIP This can result in complex clipping paths, which may not print on some devices.



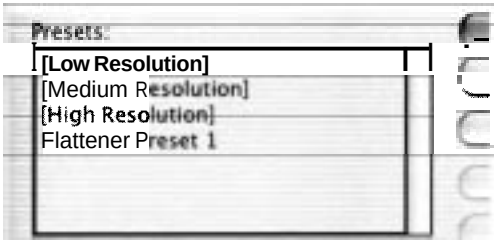
43 ***The*** Transparency Flattener Presets dialog box ***lets you define newpresets for handling transparency effects.***



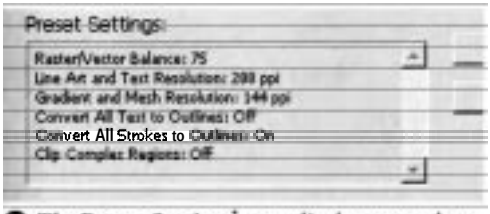
44 ***The*** Transparency Flattener Preset Options dialog box ***contains the settings for a custom transparency flattener preset.***



45 ***The*** Options area ***in the Transparency Flattener Preset Options dialog box.***



46 The three default transparency flattener presets ***in brackets cannot be edited or deleted.***



47 *The* Preset Settings area *displays a readout of* ***the settings for a particular transparency flattener preset.***

To edit a transparency flattener preset:

1. Choose the preset you want to edit.

TIP The three default presets, surrounded by brackets, cannot be edited 45.

2. Click the Edit button.
3. Edit the preset in the Transparency Flattener Preset dialog box.

TIP The Preset Settings area displays a readout of the settings for each preset 47.

To delete transparency flattener presets:

1. Choose the presets you want to edit.

TIP The three default presets, surrounded by brackets, cannot be deleted 46.

TIP Use the Shift key to select multiple adjacent presets. Use the Cmd/Ctrl key to select multiple non-adjacent presets.

2. Click the Delete button.

You can also save transparency flattener presets to share among others. Once saved, the presets can then be loaded onto other machines.

To save a transparency flattener preset:

1. Choose the presets you want to save.

TIP Use the Shift key to select multiple adjacent presets. Use the Cmd/Ctrl key to select multiple non-adjacent presets.

2. Click the Save button.
3. Name the file.

To load a transparency flattener preset:

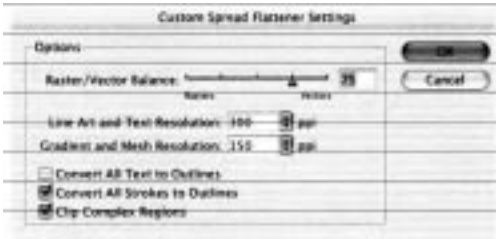
1. Click the Load button.
2. Navigate to find the file that contains the presets.
3. Click Open. The presets appear in the Transparency Flattener Presets dialog box.

You can apply a flattener preset to the document in the Advanced category of the Print dialog box *(seepage* 436). However, you may have one page that requires special flattener controls. InDesign lets you apply flattener presets to each specific spread.

TIP Flattening must be handled on a per spread, not per page basis.

To apply a flattener preset to an individual spread:

1. Move to the spread.
2. In the Pages palette menu, choose one of the following from the Spread Flattening menu:
   - Default leaves the spread flattening at whatever setting is applied to the document.
   - None (Ignore Transparency) prints the spread without any transparency effect. This setting is useful for print shops that need to troubleshoot during output.
   - Custom opens the Custom Spread Flattener Settings dialog box. These settings are identical to ones in the Transparency Flattener Presets Options dialog box *(see page* 436) 48.



a The Custom Spread Flattener Settings dialog box *lets you apply different flattener controls to a specific spread.*

A Short Course in Flattening

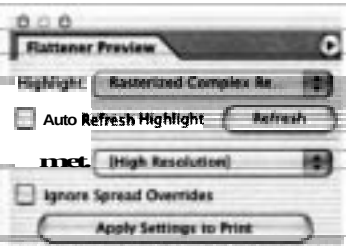
You may feel a little overwhelmed by all the controls for flattening transparency. Don't panic, most of the flattening options are best set by the print house that will output your files.

However, there are some simple rules that can make it easier to get successful results when flattening artwork.

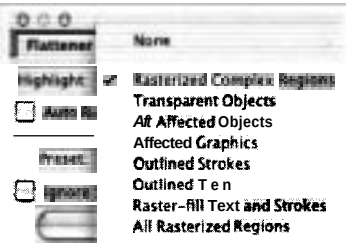
Unless you absolutely want text to be part of a transparency effect, keep your text above any transparency effects. For instance, instead of putting text underneath a drop shadow, move it above 51. If the text is black, you want see any difference in the final output. If it's a color, set it to overprint.

Try to avoid overlapping two gradients with transparency effects. That combination creates objects that are much too complex.

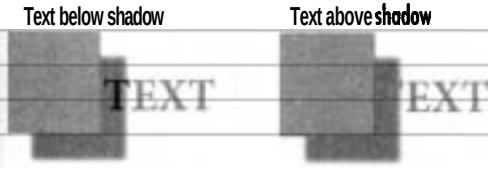
Run tests. The first time I used transparency and blend modes, I sent ten sample pages to my publisher who had them output at the print shop. We looked to make sure none of the text had changed and there were no problems with the images. It saved us a lot of worry when the book went to press.



49 *The* Flattener Preview palette *lets you see the effects of the flattener presets on your document.*



50 *Use the* Highlight menu *to choose which objects will be displayed in the Fattener preview.*



6) The Flattener preview highlights *the objects affected by transparency. Here the text below the shadow is highlighted while the text above the shadow is not.*

Instead of waiting for your file to be printed, you can preview how the flattening will occur with the Flattener Preview palette.

To preview the flattener settings:

1. Choose Window>Output Preview> Flattener. This opens the Flattener Preview palette 49.
2. Choose one of the options from the Highlight menu 50. This controls which objects will be displayed in the flattener preview. ***(See the chart on the next page for a description of each of these options.)***
3. Use the Preset menu to choose which flattener preset is used to control the flattener preview.
4. Click the Refresh button to update the screen preview. The page displays the highlighted objects in red against other grayscale objects 6).

   or

   Check Auto Refresh Highlight to have the screen update automatically.
5. Check Ignore Spread Overrides to use only the setting in the Preset menu.
6. If you want, click the Apply Settings to Print to apply the settings to the Advanced category of the Print dialog box.

TIP You can open the Transparency Flattener Presets dialog box using the Flattener Preview palette menu.

Transparency Resources

This book can hardly cover all the aspects of setting transparency and flattening. For more information see the InDesign online Help pages.

Also, download the document ***Achieving Reliable Print Output with Transparency*** on the Adobe Web site.

Finally, if you are a service provider, you should look at the Print Service Provider Resources page of the Adobe Solutions Network (ASN).

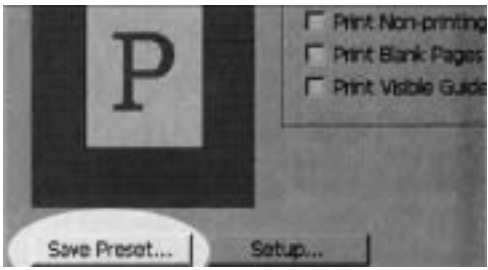
Highlight menu setting	Flattener Preview applied
None	Turns off the flattener preview.
Rasterized Complex Regions	Highlights areas that will be rasterized according to the settings in the Raster/Vector Balance slider.
Transparent Objects	Highlights objects that are the sources of transparency effects. This includes objects with opacity settings, blend modes, feathers, drop shadows, alpha channels, and placed images with transparency.
All Affected Objects	Highlights the transparent objects as well as the objects that are affected by transparency.
Affected Graphics	Highlights all placed images affected by transparency or transparency effects.
Outlined Strokes	Highlights the strokes that will be outlined due to transparency or because the Convert All Strokes to Outlines option is selected.
Outlined Text	Highlights the text that will be outlined due to transparency or because the Convert All Text to Outlines option is selected.
Raster-fill Text and Strokes	Highlights text and strokes that have rasterized fills due to flattening.
All Rasterized Regions	Highlights the objects that will be rasterized.

Working with Print Presets

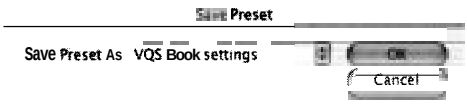
With all the areas in the Print dialog box, you wouldn't want to have to set all the controls each time you have a new document. InDesign lets you save the print settings so you can easily apply them later.

To save a print preset:

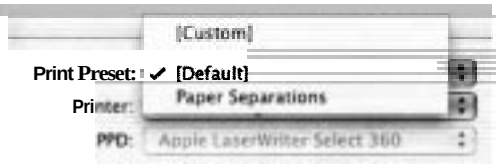
1. Set all the categories in the Print dialog box to the settings you want to save.
2. Click the Save Preset button at the bottom of the Print dialog box (52). This opens the Save Preset dialog box (53).
3. Enter a name for the preset.
4. Click OK. This saves the preset.



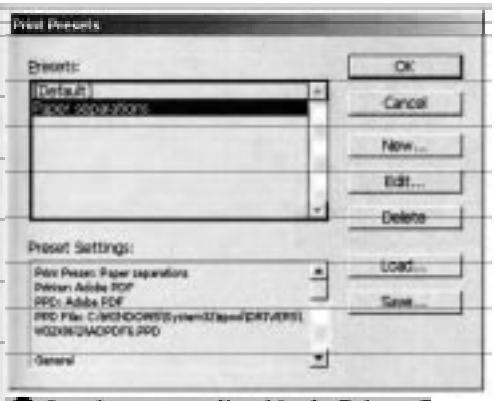
(52) *Click the* **Save Preset button** *to save the current Print settings as a printpreset.*



(53) *Use the* Save Preset dialog box *to name your own printer preset.*



54 *A saved preset can be applied using the* **Printer Preset menu** *at the top of the Print dialog box.*



55 *Savedpresets are listed in the* **Printer Preset** dialog box.

To apply a print preset:

1. Choose a saved preset from the Print Preset menu at the top of the Print dialog box 54.

You don't need to go through the Print dialog box to create and save a print preset.

To define a printer preset:

1. Choose File >Printer Presets >Define. The Define Printer Presets dialog box appears 55.
2. Click the New button to define a new preset. This opens a version of the Print dialog box that lets you set the various print categories.

   or

   Click the Edit button to make changes to the selected print preset.

To delete a printer preset:

1. Select the presets you want to delete in the Define Printer Presets dialog box.
2. Click the Delete button.

One of the benefits of working with printer presets is that you can export them so others can print documents with the same settings.

To export printer presets:

1. In the Define Printer Presets dialog box, select the presets you want to export.

TIP Use the Shift key to select adjacent multiple presets. Use the Cmd/Ctrl key to select non-adjacent multiple presets.

2. Click Export. A dialog box appears where you can name the document that contains the exported presets.

Your service bureau can provide you with printer presets that you can import to use for printing or packaging documents.

To import printer presets:

1. In the Define Printer Presets dialog box, click Import.
2. Use the dialog box to select the document that contains the presets exported from another machine.
3. Click OK. The presets appear in the Define Printer Presets dialog box.

Creating a Print Summary

With all the settings in the Print dialog box, you may want to keep track of how a document has been printed. The Summary area gives you a report of **all** the print settings.

To use the Summary area:

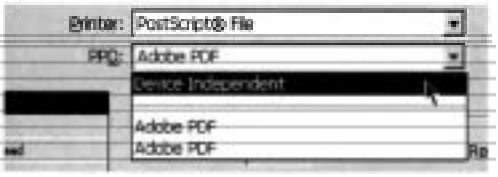
- Scroll through the summary area to read **all** the settings applied to a print job ⓯.

  or

  Click the Save Summary button to save a text file listing **all** the print settings.

⓯ ***Use the*** Summary area ***to see all the print settings applied to a document.***

57 ***Choose* PostScript® File *from the Printer menu to create a file that contains all the information necessary to print the document.***



58 ***Choose* Device Independent *from the PPD menu to create a PostScript file that can be printed to any printer.***

Creating PostScript Files

Instead of sending the InDesign document to a service bureau, you can create a PostScript file that contains **all** the information necessary to print the file. (This is sometimes called printing ***to disk.)*** A standard PostScript file contains all the information necessary to print the file as well as the specific information about the printer.

To create a standard PostScript file:

1. Choose File >Print.
2. Choose **PostScript®** File from the Printer menu **57**.
3. Choose the type of printer that will print the file.
4. Set **all** the options in the print categories in the Print dialog box.

TIP Check with the service bureau that will print your file for the correct options.

5. Choose a name and location for the file.

TIP (Mac) Add the **suffix** *.ps* to the file name to indicate that it is a PostScript file.

6. Click Save.

A device-independent PostScript file does not contain any information about the type of printer or output device.

TIP This lets you create a PostScript file even if you don't know the type of printer that your document will be printed on.

To create a device-independent Postscript file:

1. Choose File >Print.
2. Choose Device Independent from the PPD menu **58**.
3. Follow steps **3–6** in the previous exercise.

Creating a Preflight Report

When you create an InDesign document, you have two jobs: designer and production manager. As the production manager, you need to know if there could be any problems printing your job. Fortunately, InDesign has a built-in preflight utility that checks all the elements in your document to make sure they print correctly. (The name comes from the list that airline pilots complete before they take off.)

To run the preflight utility:

1. Choose File >Preflight. InDesign takes a moment to check all the elements of the document and then ovens the Preflight dialog box@.
2. Review the information in the Preflight Summary 60.

TIP Any potential printing problems are flagged with an alert symbol in the Preflight Summary.

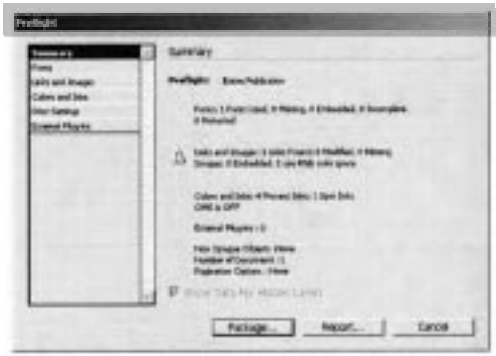
3. Click each of the categories in the Preflight dialog box 61. ***(See the following exercises for details on these categories.)***
4. Click the Report button to create a report of the preflight status.

   or

   Click the Package button to copy all the necessary files into a folder that you choose before you print the document.

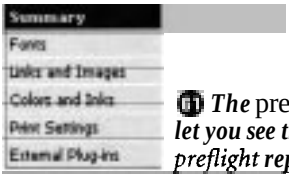
TIP The Package button is the same as the Package command located on the File menu. ***(See page*** 447 ***for more information on packaging a document.)***

You can open the preflight report in a text editor.

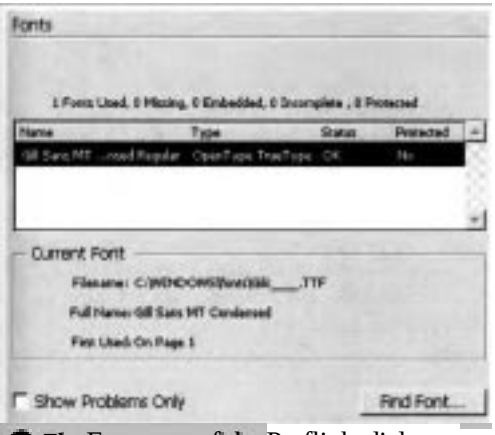


60 *The* **Preflight dialog box** *lets you choose each of the categories for the various aspects of printing a document.*

60 ***The*** Summary area ***of the Preflight dialog box gives you an overview of the categories checked during a preflight.***



61 ***The*** preflight categories ***let you see the details of the preflight report.***

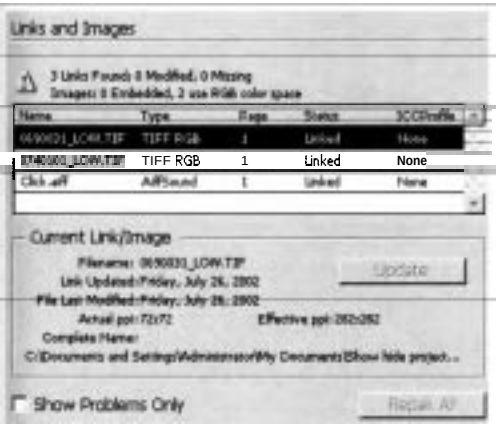


62 *The* Fonts area of the Preflight dialog box *shows you the status of the fonts used in a document.*

Your service bureau may ask you to use only Type 1 fonts. The Fonts area lets you make sure that you have used the correct fonts and that they are correctly installed.

To review the fonts information:

1. Choose Fonts from the categories on the left of the Preflight dialog box. This opens the Fonts area, which shows the type of font and whether it is installed in the system 62.
2. If you want to replace a non-standard or missing font, click the Find Font button. This opens the Find Font dialog box that lets you replace fonts *(seepage* 352).



63 *The* Links and Images area of *the Preflight dialog box shows you the status of the placed images in the document.*

You also want to make sure that placed graphics are in the correct format and that they aren't missing or modified.

To review the Links information:

1. Choose Links and Images from the categories on the left of the Preflight dialog box. This opens the Links area, which shows the placed images 63.
2. Choose the modified or missing image.
3. If the image is modified, click the Update button.

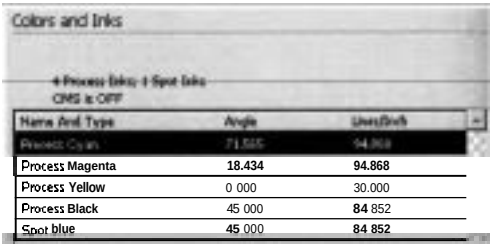
   or

   If the image is missing, click the Relink button. This opens the Find dialog box.
4. Navigate to choose the missing image.
5. Click the Repair All button to have InDesign update all modified images or open the dialog box for all missing images.

You should also check the colors and inks to make sure that the right number of colors print.

To review the Colors and Inks information:

- Choose Colors and Inks from the categories on the left of the Preflight dialog box. This shows the colors used within the document 64.

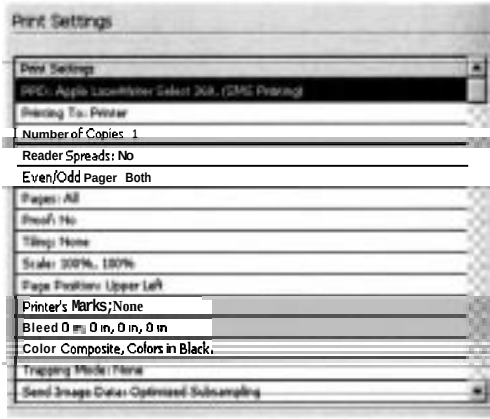


64 *The* Colors and Inks area *of the Preflight dialog box shows the process and spot color plates in the document.*

You can also look at the Print Settings for a complete list of all the print settings currently applied to the document.

To review the Print Settings information:

- Choose Print Settings from the categories on the left of the Preflight dialog box. This shows the print settings applied to the document 65.



65 *The* Print Settings area *of the Preflight dialog box shows you the current print settings applied to the document.*

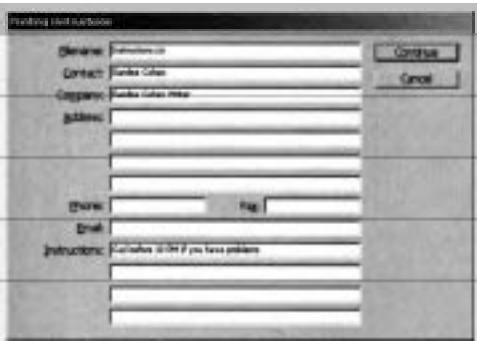
You can also look to see if any external plug-ins were used in creating the document. You may need to alert your print shop that these plug-ins are necessary for outputting the document.

TIP You don't need to worry about the plug-ins unless you have installed any special third-party plug-ins.

To review the external plug-ins information:

- Choose External Plug-ins from the categories on the left of the Preflight dialog box. This shows any third party plug-ins that have been installed 66.

66 *The* External Plug-ins area *of the Preflight dialog box shows any third party plug-ins that have been installed. (Sadly, I don't own any.)*



The Printing Instructions dialog box ***lets you create a text file with contact information and instructions about the document package.***

The Create Package Folder dialog box ***lets you choose which items should be included in the package folder.***

Packaging a Document

A package is a folder that contains everything necessary to print a document. Instead of manually collecting all the files, the Package command assembles the files for you.

To package files for printing:

1. Choose File >Package. InDesign looks through the document and then opens the Printing Instructions dialog box 87.
2. Fill out the contact and file information.

TIP The information in the Printing Instructions dialog box is kept if you repackage the document later.

3. Click Continue. This opens the Create Package Folder dialog box 88.
4. Enter a name for the folder that will hold the files.
5. Check the following options for the package:
   - Copy Fonts (roman only) copies the fonts used in the document. ***(See the sidebar on the next page for a discussion of copying fonts.)***
   - Copy Linked Graphics copies placed images that are not embedded in the file.
   - Update Graphic Links in Package automatically updates any modified graphics.
   - Use Document Hyphenation Exceptions Only limits the hyphenation exceptions to only those added to the document.
   - Include Fonts and Links from Hidden Layers adds the fonts and graphics from layers that are not visible.
   - View Report launches a text editor to open the report created with the document.
6. Click Package to assemble all the necessary files in the folder.

Copying Fonts: Legal or Not?

If you choose to send fonts, a warning notice appears about the legalities of copying fonts 18. You may have heard stories of people carted off to prison for illegally copying software, While there have been people arrested for software piracy, the rules about fonts are more intricate.

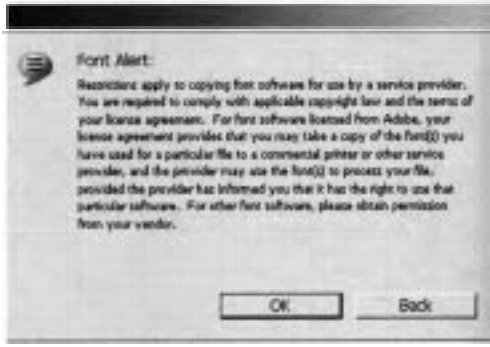
Some font companies, such as Adobe, allow you to send a copy of the font along with your document provided that the service bureau that is going to print your file also has its own copy of the font. Other companies let you send the font along with your file, but the font can only be used to print *your* documents. You must check the license that came with the font.

So why would a service bureau want a copy of your font if it already has a copy? They want to make sure they use exactly the same font as the one you used to create the document.

This is why most service bureaus spend thousands of dollars to buy complete font libraries. If the bureau doesn't have a copy of the font, you should not send the font along with the file. Either the service bureau buys the font or you should create a prepress package.

Of course, if you use a program such as FontLab to make your own fonts, you have total permission to copy the fonts and give them to anyone you want. For instance, the tip bullet in this book is a font I created—I have no problem getting permission to copy that font.

However, the figure numbers are a specialized font I bought. I will have to buy another license to send that font to my service bureau.



18 *The Font Alert is a gentle reminder that both you and the service bureau need to own a copy of a font before you can copy and send it with a file.*

19 EXPORTING

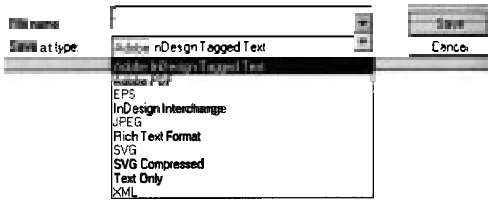
Printing your document on paper is only one way in which your InDesign files can be published. Today there are many more options for publishing documents.

For instance, you might want clients to read your document electronically—even if they don't have the InDesign application. Or you might want to take a design that you created with InDesign and use it as the graphic in another page-layout program. Or you may want to turn your InDesign document into Web pages.

When you convert InDesign documents into other formats, you use the export features of the program. Using the export command lets you change InDesign documents into other types of publications such as portable document format (PDF) files or Web hypertext markup language (HTML) pages.

Setting the Export File Options

InDesign gives you many export options. In each case you choose a file format, name the file, and save it to a location.



❶ *The options for exporting InDesign documents.*

To choose a file format:

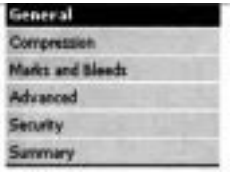
1. Choose File >Export. The Export dialog box appears ❶.

TIP You will not see the options for exporting text unless your insertion point is inside a text frame.

2. Give the file a name and set the location.
3. Choose one of the following formats from the Save as File Type (Win) or Formats (Mac) menu:

Adobe InDesign Tagged Text	Creates a text file formatted with codes *(see page 472)*.
Adobe PDF	Creates an Acrobat file *(see page 451)*.
EPS	Creates a file that can be placed as a graphic *(see page 464)*.
InDesign Interchange	Creates a special format that can be used for repurposing InDesign documents *(see page 467)*.
JPEG	Converts the page or selected elements into a raster image that can be used in a Web page *(see page 467)*.
Rich Text Format	Exports selected text with formatting that can be read by most word processing applications *(seepage 472)*.
SVG and SVG Compressed	Creates scalable vector graphics that can be viewed on the World Wide Web *(see page 469)*.
Text	Exports selected text without any formatting *(see page 472)*.
XML	Creates text formatted with the extensible markup language that offers customizable definitions and tags. *(Working with* XML *is way beyond the scope of my book. I recommend "Real World InDesign CS" by David Blatner and Olav Martin Kvern for their brilliant expertise on this topic.)*

4. Click Save. This opens the options dialog box for each format.



*@ The Export **PDF*** **categories list.**

Creating PDF Files

You can convert your InDesign documents into PDF files so that others can read them — even if they do not have the InDesign application.

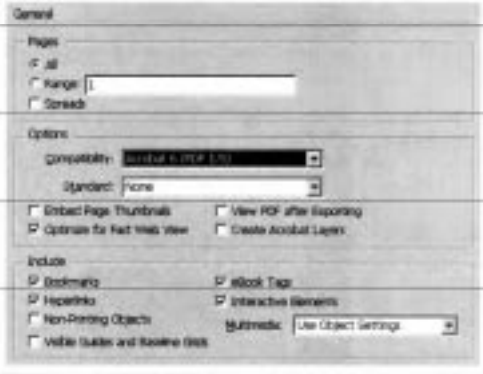
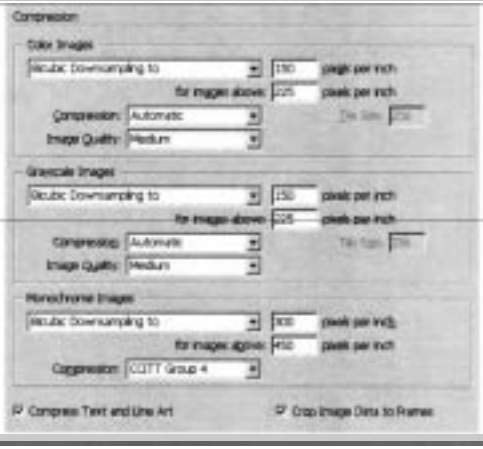
To set the PDF export options:

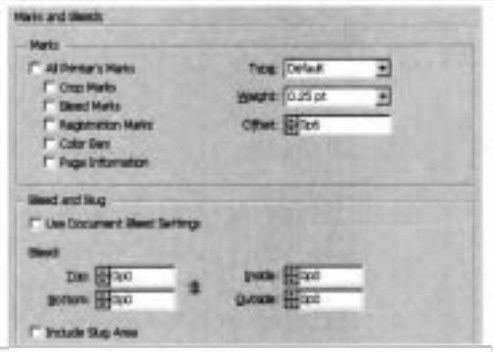
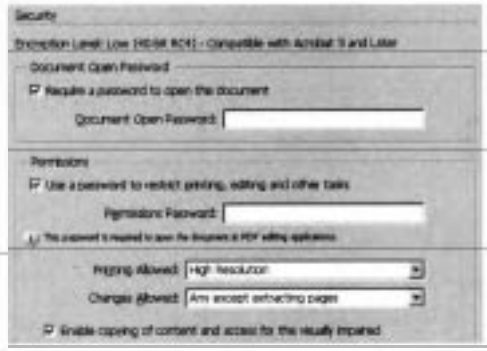
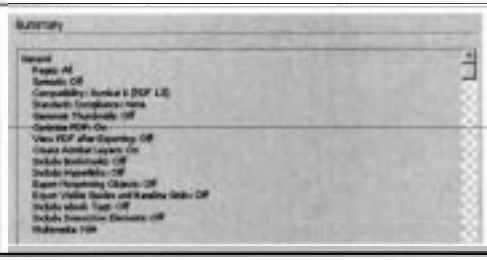
1. Click each of the categories on the left side of the dialog box ❷ to display the options as described in the chart below:

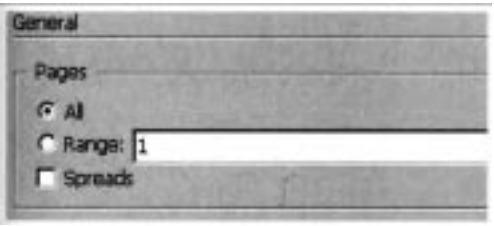
TIP You do not need to set all the controls every time you print unless you need to change a specific setting.

3. Click the Export button to create the PDF file.

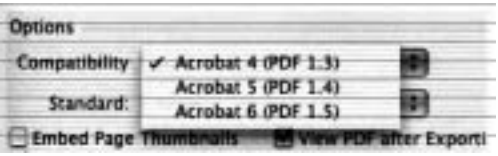
PDF Export Options

Print Category	Settings	Comment
General		Sets the general PDF export options *(see page* 453).
Compression		Controls how images and other elements are compressed in the PDF *(see page* 456).

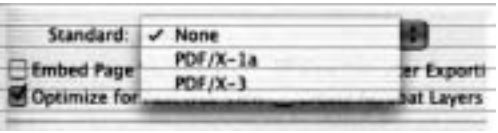
Marks and Bleed		Adds printer's marks and a bleed area to the PDF. These are the same controls as in the Print dialog box *(see pages 425)*.
Advanced		Sets the controls for color, PDF/X, fonts, OPI, and transparency to the PDF *(see page 459)*.
Security		Sets the controls for passwords, and permissions for whether the document can be printed or edited *(see page 460)*.
Summary		These are the same as the summary controls in the Print dialog box *(see pages 442)*.



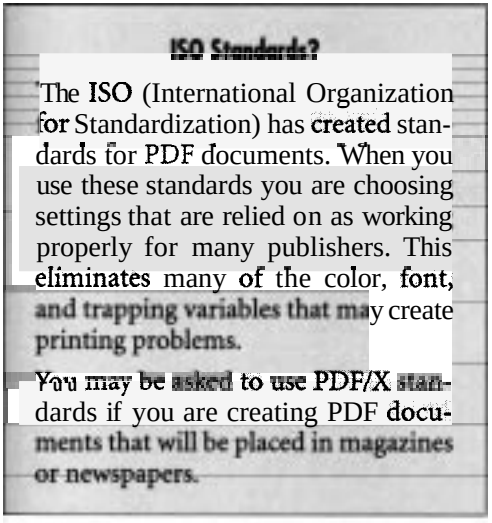
❸ *The* Pages area *in the General category of the Export PDF dialog box.*



❹ *The* Compatibility menu *lets you choose which PDF version you export.*



❺ *The* Standard menu *lets you apply an ISO standard for PDF documents.*



ISO Standards?

The ISO (International Organization for Standardization) has created standards for PDF documents. When you use these standards you are choosing settings that are relied on as working properly for many publishers. This eliminates many of the color, font, and trapping variables that may create printing problems.

You may be asked to use PDF/X standards if you are creating PDF documents that will be placed in magazines or newspapers.

General PDF Options

These are the various areas in the General category for exporting as a PDF.

To specify which pages to export:

1. In the Pages area, select **All** to export **all** the pages in the document ❸.

   or

   Select Range to enter specific pages.

TIP Use the hyphen to select a range of pages such as 4-9, or use commas to enter individual pages such as *3, 8*.

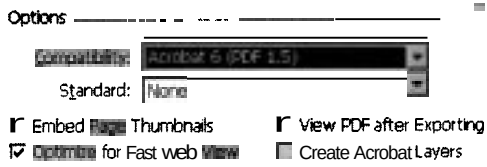
2. Check Spreads to keep pages that are within spreads together in the Acrobat file.

To set the PDF version and standard:

1. Use the Compatibility menu to choose one of the following ❹:
   - Acrobat 4.0 (PDF 1.3) creates files that can be opened by a majority of readers.
   - Acrobat 5.0 (PDF 1.4) preserves transparency, text, and spot colors, if the PDF is placed into another page-layout program.
   - Acrobat 6.0 (PDF 1.5) supports the most PDF features including layers and embedded multimedia.
2. Use the Standard menu to choose one of these two recognized ISO (International Organization for Standardization) standards for PDF files ❺:
   - **PDF/X-1a** is used for a CMYK workflow that does not contain color profiles for images.
   - **PDF/X-3** is used for a color-managed workflow that does use color profiles for images.

To set the general options:

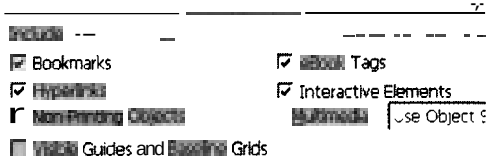
- Choose one of the following from the Options area in the General category ❻:
  - Embed Page Thumbnails adds a thumbnail image for each page in the PDF. This option is not necessary for PDFs that will be viewed in Acrobat 5 or 6.
  - **Optimize** for Fast Web View restructures the file to prepare for downloading from Web servers.
  - View PDF after Exporting opens the finished Adobe PDF file in Acrobat.
  - Create Acrobat Layers is available only for PDF 1.5. It converts the layers in InDesign into layers that can be viewed in Acrobat.



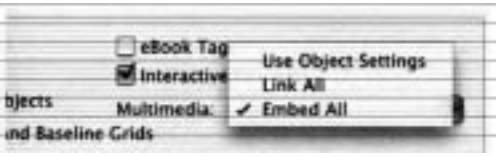
❻ *The* Options controls *in the General category of the Export PDF dialog box.*

To control what to include in the PDF:

- Choose one of the following from the Include area in the General category ❼:
  - Bookmarks creates bookmarks for table of content entries, preserving the TOC levels.
  - **Hyperlinks** creates Acrobat hyperlinks from InDesign hyperlinks, table of content entries, and index entries.
  - Non-printing **Objects** exports objects that have the non-printing option applied.
  - Visible Guides and Baseline Grids exports the guides and grids currently visible in the document.
  - **eBook** Tags marks elements in the story using the Acrobat 5.0 tags that InDesign supports.
  - Interactive Elements exports InDesign's buttons as interactive PDF elements.



❼ *The* Include settings *in the General category of the Export PDF dialog box.*



The **Multimedia** *menu in the General category of the Export PDF dialog box.*

Talk to your Service Bureau

If you create PDF files for onscreen viewing or to be downloaded from the Web, you can use the compression settings to reduce the file size.

However, if you create PDF files to be output by a service bureau for print work, you should not apply too much downsampling or compression.

Ask your service bureau for the correct settings. Better yet, ask them to create a PDF style that you can load onto your machine *(see page 462)*.

If you have movie or sound clips in the document, you can choose if those files are linked or embedded into the PDF document.

To set the multimedia embedding options:

- Choose one of the following from the Multimedia menu in the General category:
  - **Use Object Settings** embeds or links the movie or sound clip according to the settings applied to each media clip.
  - **Link *All*** overrides any object setting and links all media clips to the PDF. Both the PDF and the media files must be kept together for the media to play properly.
  - **Embed All** overrides any object setting and embeds all media clips in the PDF.

Compression PDF Options

One of the benefits of creating PDF files is that they can be compressed to take up less space. You use the same controls for compressing color and grayscale bitmap images ❾.

To set the color and grayscale downsampling:

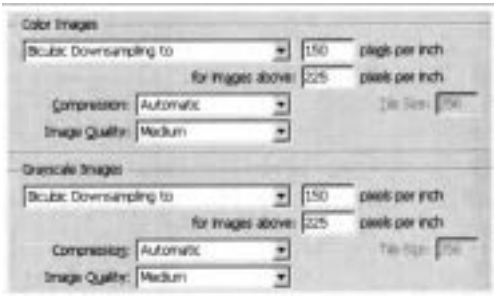
1. Choose one of the following from the Sampling menu ❿:
   - Do Not Downsample does not throw away any pixel information. Use this to maintain all information in the image.
   - Downsampling to averages the pixels in a sample area.
   - Subsampling to reduces processing time compared to downsampling, but results in images that are less smooth.
   - Bicubic downsampling to is the slowest but most precise method, resulting in the smoothest tonal gradations.
2. When you have set a downsampling method, enter an amount in the resolution field ⓫.

TIP For print work this is usually 1.5 times the line screen of the printing press.

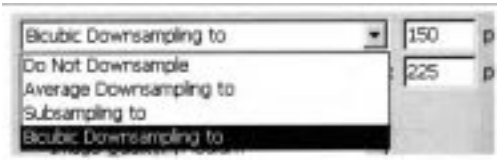
TIP For onscreen viewing this is usually 72 pixels per inch.

3. Enter an amount in the field for images above a certain resolution ⓫.

TIP This helps you downsample only high-resolution images without losing information in lower-resolution images.

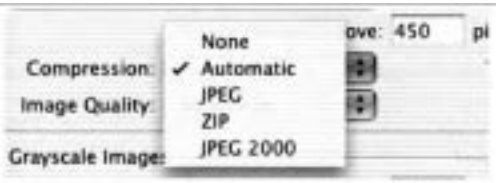


❾ *The* compression controls *in the Export PDF dialog box for color and grayscale* bitmap *images.*

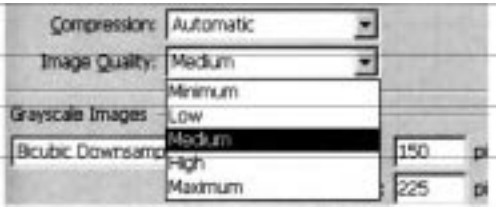


❿ *The* Sampling menu *for color and grayscale* bitmap *images.*

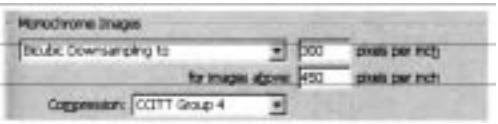
⓫ *The* Resolution fields *for color and grayscale* bitmap *images.*



⓬ *The* Compression menu *for color and grayscale* **bitmap** *images.*



⓭ *The* Image Quality menu *for color and grayscale* **bitmap** *images.*



⓮ *The* compression controls *for monochrome images.*

⓯ *The* downsampling menu *for monochrome images.*

To set the color and grayscale compression:

1. Choose one of the following from the Compression menu ⓬:
   - None applies no compression to the image.
   - Automatic lets InDesign judge whether or not JPEG or ZIP compression should be applied.
   - JPEG applies a compression that is best for images with tonal changes.
   - ZIP applies a compression that is best for images with large areas of flat color.
2. Choose a setting from the Quality menu ⓭:
   - Maximum sets the least amount of compression.
   - Minimum sets the most.

TIP Use Maximum for high-end output.

The compression options for monochrome **bitmap** images (such as 1-bit scanned art) are slightly different from those for color and grayscale images ⓮.

To set the monochrome bitmap downsampling:

- Choose one of the following from the Downsampling menu ⓯:
  - Do Not Downsample does not throw away any pixel information. Use this setting if you want to maintain all the information in the image.
  - Average Downsampling to averages the pixels in a sample area.
  - Subsampling to is faster than **down**-sampling, but creates images that are less smooth.
  - Bicubic downsampling to is the slowest but most precise method, resulting in the smoothest tonal gradations.

To set the monochrome bitmap resolution:

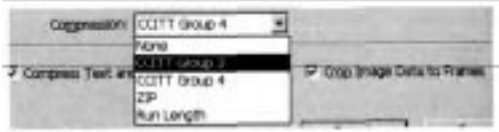
1. When you have set a downsampling method, enter an amount in the resolution field ⓰.

TIP For print work, this is usually the resolution of the output device with a limit of 1500 DPI.

2. Enter an amount in the field for images above a certain resolution ⓯.

TIP This helps you downsample only high-resolution images without losing information in lower-resolution images.

⓰ *The* **resolution fields** *for monochrome images.*



⓱ *The* **Compression menu** *for monochrome images.*

To set the compression for monochrome images:

1. Choose one of the following from the Compression menu ⓱:
   - None applies no compression to the image.
   - **CCITT** Group 3 is similar to the compression used for faxes.
   - **CCITT** Group 4 is a general-purpose method that produces good results for most monochromatic images.
   - ZIP works well for black-and-white images that contain repeating patterns.
   - Run Length produces the best results for images that contain large areas of solid black or white.
2. Check Compress Text and Line Art to further reduce the size of the file.
3. Check Crop Image Data to Frames to delete the image outside the frame.

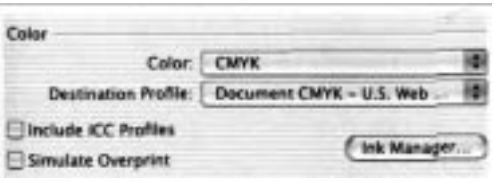
Subsetting Fonts?

One reason why PDFs became popular is you don't have to worry about someone having fonts in order to view the file. You can *embed* the entire font or you can *subset* only a portion.

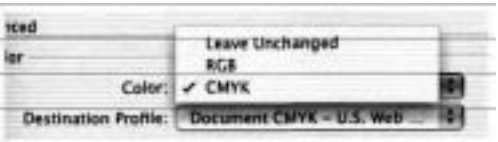
If you embed the entire font, you add to the file size, but you allow anyone who has the file to make changes to the text. If you subset a font, it makes a smaller file, but it also means that the person on the other end must have the font on their system if they want to make any changes in the text.

The default setting of 100% means that only a subset of the font will be embedded unless you have used every single character in the font. If you lower the threshold to, let's say 35%, InDesign embeds only the characters used in the document up to a maximum of 35% of the characters. If you use more than 35% of the characters, InDesign embeds all the characters in the font.

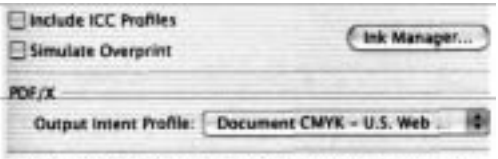
There is no option to embed, but if you set the amount to 1% then you will most likely embed all the characters in the font.



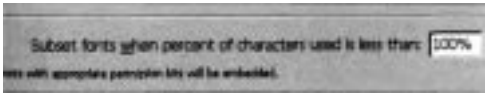
18 ***The*** Color controls ***in the Advanced area of the Export PDF dialog box.***



19 ***The*** Color controls ***in the Advanced area of the Export PDF dialog box.***



20 *The* PDF/X menu *in the Advanced area of the Export PDF dialog box.*



21 ***The*** Subset fonts when percent of characters used is less than field ***in the Advanced area of the Export PDF dialog box.***

Advanced PDF Options

The Advanced category contains the controls for handling colors, fonts, and setting the transparency flattener options **18**.

TIP The OPI controls are the same as the ones in the Print dialog box *(see page 435)*.

TIP The Transparency Flattener controls are the same as the ones in the Print dialog box *(see page 435)*.

To set the color controls:

1. Choose one of the following from the Color menu **19**:
   - Leave Unchanged does not convert the colors in the document.
   - RGB converts **all** colors to RGB, which is best for onscreen viewing.
   - CMYK converts all colors to CMYK, which is appropriate for process color separations.
2. Choose a profile for the type of output device from the Destination Profile.
3. Check Include ICC Profiles to keep embedded profiles with the document.
4. Check Simulate Overprint to show onscreen a representation of how overprinting will look when printed.

To set the PDF/X profile:

- If you have chosen a PDF/X standard, choose a profile in the Output Intent Profile menu **20**.

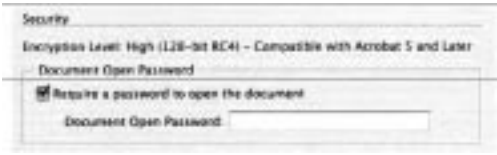
To control how much of a font is embedded:

- Enter an amount in the Subset Fonts field for the threshold amount **21**. That threshold determines how many characters of the font will be embedded. *(See the sidebar on the opposite page.)*

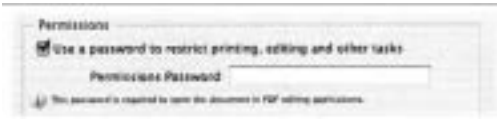
Security PDF Options

You can also set security options for PDF files to restrict who can open the file or to limit what they can do to it. There are two types of security options. If you create PDF 1.4 or 1.5 files, the security is set to the higher (128-bit) options. If you create an PDF 1.3 document, the security is set to the lower (40-bit) options.

The Document Open Password area allows you to set the password that readers must enter in order to open the file.



22 ***The*** Document Open Password area ***of the Security category of the Export PDF dialog box.***



23 ***The*** Permissions area ***of the Security category of the Export PDF dialog box.***

To set the document password:

1. Check Require a password to open this document **22**.
2. Type a password in the Document Open Password field.

The Permissions area sets up what edits and modifications people can make to the PDF once they have opened it. The Permissions password is needed in order to change the settings in the Permissions area.

24 ***The*** Printing Allowed menu of ***the Security category of the Export PDF dialog box.***

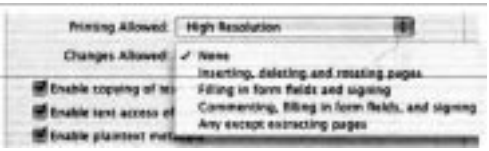
To set the permissions password:

1. Check Use a password to restrict printing, editing, and other tasks **23**.
2. Type a password in the Permissions Password field.

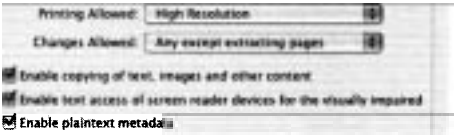
TIP This can't be the same as the Document Open Password.

To set the printing permission:

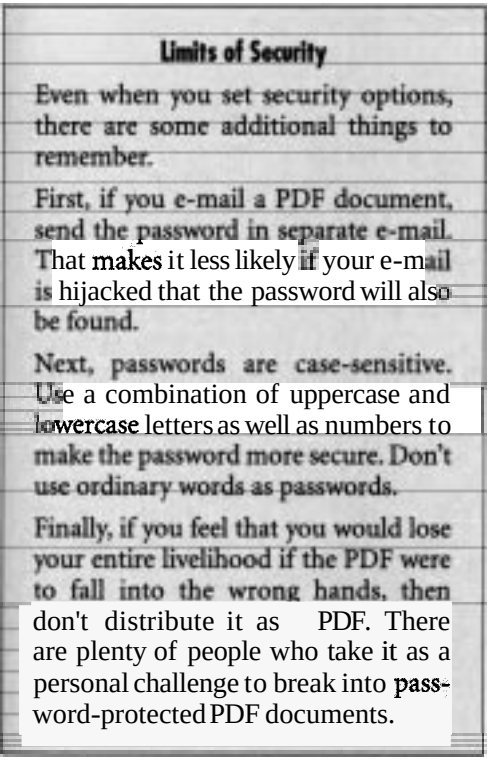
- Choose one of the following from the Printing Allowed menu **24**:
  - None turns off all printing from the document.
  - Low resolution (150 dpi) prints only low resolution versions of the images.
  - High resolution prints the full resolution of the images.



25 ***The*** Changes Allowed menu ***of the Security category of the Export PDF dialog box.***



26 ***The other permissions you can set in the Security category of the Export PDF dialog box.***



Limits of Security

Even when you set security options, there are some additional things to remember.

First, if you e-mail a PDF document, send the password in separate e-mail. That makes it less likely if your e-mail is hijacked that the password will also be found.

Next, passwords are case-sensitive. Use a combination of uppercase and lowercase letters as well as numbers to make the password more secure. Don't use ordinary words as passwords.

Finally, if you feel that you would lose your entire livelihood if the PDF were to fall into the wrong hands, then don't distribute it as PDF. There are plenty of people who take it as a personal challenge to break into password-protected PDF documents.

To set the changes that are allowed:

1. Choose one of the following from the Changes Allowed menu **25**:
   - None allows no changes whatsoever.
   - Inserting, deleting and rotating pages allows the user only to add, remove, or change the position of pages in the document. It does not allow changing the content of the pages.
   - Filling in form fields and signing allows changes to form fields or applying a security signature to the document.
   - Commenting, filling in forms, and signing allows adding comments, changing form fields, or applying a security signature to the document.
   - Any except extracting pages allows all changes except removing pages from the document.
2. Check any of the following as desired **26**:
   - Enable copying of text, images and other content.
   - Enable text access of screen reader devices for the visually impaired.
   - Enable plaintext metadata.

Working with PDF Presets

Just as you can create printer presets for printing documents *(see pages 441)*, you can also create PDF presets that contain settings for generating different types of PDF documents. For example, you may want to post a PDF file on the Web or send the file to a print shop for output.

To save the current PDF settings as a PDF preset:

1. Set the options in the Export PDF dialog box.
2. Click the Save Preset button (27). This opens the Save Preset dialog box (28).
3. Enter a name for the preset and click OK. The new preset appears at the top of the Export PDF dialog box.

Once you have saved a preset, you can easily apply it.

To apply a PDF preset:

- Choose a saved preset from the Preset menu at the top of the Export PDF dialog box (29).

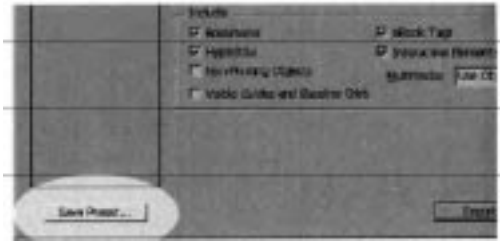
  or

  Choose File > PDF Export Presets and then pick the preset listed in the menu.

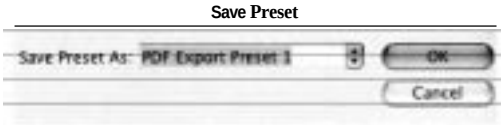
You can also define PDF presets without going through the Export PDF dialog box.

To create a PDF preset:

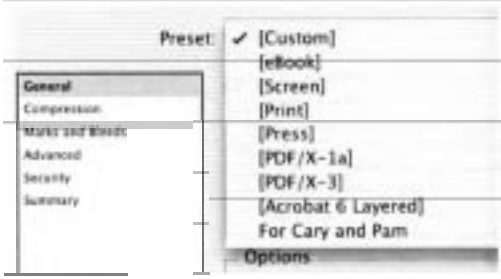
1. Choose File > PDF Presets to open the PDF Export Presets dialog box (30).
2. Click New. This opens the New PDF Preset dialog box.
3. Name the preset.
4. Choose each of the categories and set them as described earlier in this chapter.



(27) *Click the* Save Preset **button** *to create a preset based on the current settings in the Export PDF dialog box.*

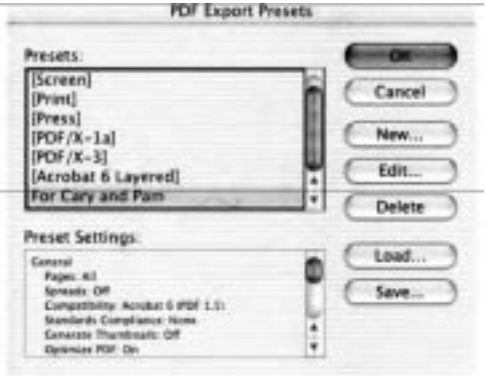


(28) *Enter a name for a PDF preset in the* Save Preset dialog box.



(29) *Choose a preset to apply to a PDF from the* Preset menu *in the Export PDF dialog box.*

(30) *The* PDF Preset dialog box *displays the PDF presets that ship with InDesign.*



31 *A* **custom PDF preset,** ***listed without brackets, can be edited, deleted, exported, or imported.***

To edit a PDF preset:

1. Select the custom preset you want to edit in the PDF Export Presets dialog box **31**.
2. Click the Edit button. This opens the Edit PDF Preset dialog box.

TIP There is no difference between the New PDF dialog box and the Edit PDF dialog box except the name in the title bar.

3. Choose each of the categories and make changes as described earlier in this section.

To delete a PDF preset:

1. Select the preset you want to delete in the PDF Presets dialog box **31**.

TIP Use the Shift key to select multiple adjacent presets.

TIP Use the Cmd/Ctrl key to select multiple non-adjacent presets.

2. Click the Delete button.
3. Click OK to confirm your choice.

To export PDF presets:

1. In the PDF Presets dialog box, select the presets you want to export **31**.

TIP Use the Shift key to select multiple adjacent presets.

TIP Use the Cmd/Ctrl key to select multiple non-adjacent presets.

2. Click the Save button. This creates a file that contains the exported presets.

To import PDF presets:

1. Click the Load button in the PDF Presets dialog box **31**.
2. Use the dialog box to select the document that contains the presets exported from another machine.
3. Click OK. The presets appear in the PDF Presets dialog box.

Creating EPS Files

You might create a special shape or design in InDesign that you would like to use in another layout program. Export the file as an EPS, or *Encapsulated Postscript*, file so that you can use it in other applications.

TIP Most of today's layout programs import PDF files. Use the EPS format for older programs than can't import PDF files.

To create an EPS file:

- Click the General tab in the Export EPS dialog box to display the pages, bleed, and general controls (32).

  or

  Click the Advanced tab to display the production controls (33). *(See pages 435 for information on setting the production controls.)*

To set the EPS pages options:

1. In the General area, choose All Pages to export **all** the pages in the document as EPS files (34).

TIP Each page is exported as its own EPS file.

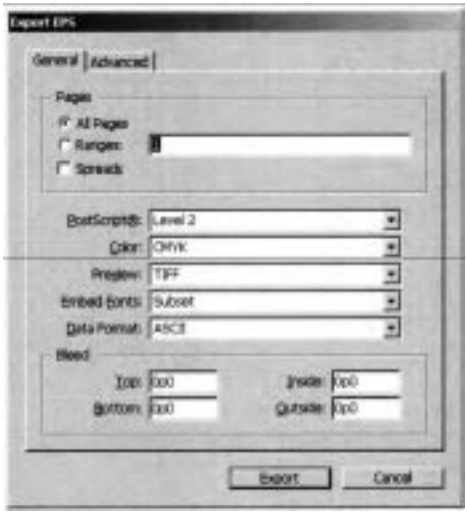
or

Choose Ranges and enter the numbers of the pages you want to export.

TIP Use hyphens to export a range of pages such as 4-9.

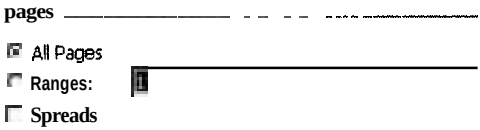
TIP Use commas to export individual pages such as **3, *8***.

2. Check Spreads to export spreads as a single EPS file.

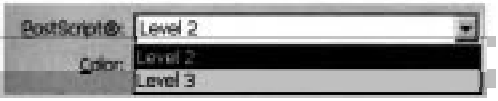


(32) *The* Export EPS dialog box *lets you create an EPS file that can be placed in other programs.*

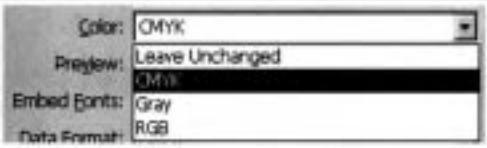
(33) *The* Advanced section *in the Export EPS dialog box contains production controls for creating an EPS file.*



(34) *Choose the pages to convert with the* Pages controls *in the Export EPS dialog box.*



35 *Use the* PostScript **menu** *in the Export EPS dialog box to set the type ofprinting instructions.*



36 *Use the* Color **menu** *in the Export EPS dialog box to control the colors in the file.*

37 *Use the* **Preview menu** *in the Export EPS dialog box to give a preview to the image.*

The PostScript level sets how complex the instructions are that are sent to the printer.

To set the EPS PostScript level:

- In the General area, use the PostScript menu to choose the following **35**:
  - Level **2** is used with older printers.
  - Level **3** is used with newer printers. Use Level **3** only if you know the printer can handle Level **3** PostScript.

You can control the color space in the file.

To set the EPS colors:

- In the General area, use the Color menu to choose one of the following options **36**:
  - CMYK forces the colors to CMYK. Use this setting for process separations.
  - **Gray** converts the colors to their grayscale values. Use this to limit the colors to a black plate.
  - **RGB** converts the colors to RGB color space. Use this for onscreen presentation programs.
  - Device Independent lets the destination printer use color management to control the color in the EPS.

Not all programs can create a preview directly from a placed EPS file. For those that can't, you need to set a preview.

To set the EPS preview:

- In the General area, use the Preview menu to choose one of the following **37**:
  - None adds no preview to the file.
  - TIFF creates a preview that is visible on both the Mac and Windows platforms.
  - PICT **(Mac** only) creates a preview that is visible on the Mac only.

Just as you can embed fonts in a PDF file, you can also embed fonts in an EPS file.

To embed fonts in the EPS file:

- In the General area, use the Embed Fonts menu to choose one of the following options 38:
  - **None** does not embed any fonts in the file.
  - Complete includes all the characters in the fonts.
  - Subset includes only the characters you have used in the file.

EPS files need to be formatted with a specific type of data.

To set the data format of the EPS file:

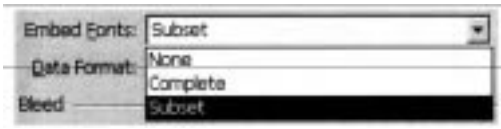
- In the General area, use the Data Format menu to choose one of the following options 39:
  - **Binary** is acceptable for most instances.
  - ASCII is used for a PC network that requires ASCII data.

TIP Choose Binary. If you have trouble printing, then switch to ASCII.

Just as you can add a bleed area when printing a document, you can add a bleed to an EPS file. *(See page 426 for additional discussion on creating a bleed.)*

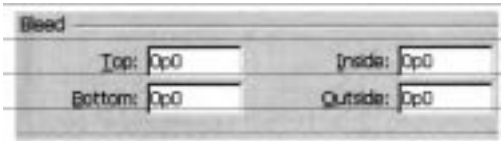
To set the size of a bleed:

- In the General area, use the bleed fields to create a bleed area 40.

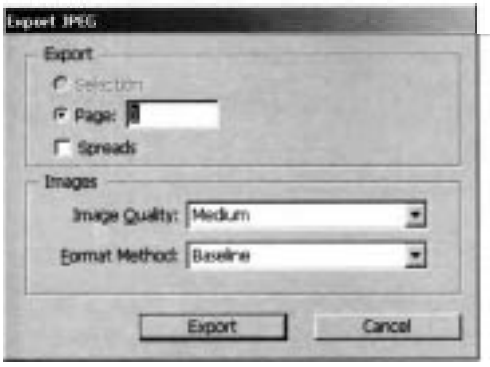


38 *Use the* Embed Fonts menu *in the Export EPS dialog box to control how many characters in a font are added to the EPSfile.*

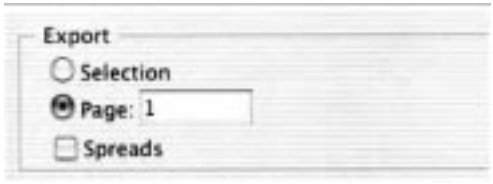
39 *Use the* Data Format menu *in the Export EPS dialog box to specify the formatting language of the EPS file.*



40 *Set the size of the bleed in the* Bleed fields *in the Export EPS dialog box.*



41 *Use the* Export JPEG dialog box *to convert an InDesign document into a JPEG file.*



42 *The* Export options *in the Export JPEG dialog box.*

InDesign Interchange Format

The InDesign Interchange Format converts an InDesign layout into a special type of XML text file that can be modified outside of InDesign.

To export in the InDesign Interchange format:

1. Choose Interchange from Formats or Save as Type menu.
2. Click Export or Save.

TIP There are no further controls for the Interchange format.

TIP Adobe has said that the Interchange format can be used to open InDesign CS files by the InDesign 2 application. Look for further information on the Adobe Web site.

Setting JPEG Export Options

You might want to convert an InDesign document into a JPEG file that can be posted on the Web. This can be done using the Export JPEG dialog box 41.

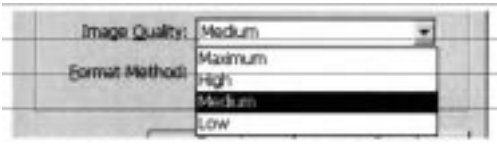
To set the area or page to be converted:

1. Use the Export area in the Export JPEG Settings Image Quality menu to choose one of the following:
   - Selection exports just the selected items as the JPEG. (The selection must be made before you choose File >**Export.**
   - **Page** to choose a specific page
2. If you are exporting a page, you can select Spread to export all the pages in the spread 42.

You can also control the quality of the JPEG image and how it is displayed in the browser.

To set the JPEG quality and display:

1. Use the JPEG Settings Image Quality menu to choose the quality of the JPEG image as follows (43).
   - Maximum creates an image that is closest to the original, but which is the largest in file size.
   - High creates an image that has a small amount of compression artifacts but is smaller in size than the Maximum setting.
   - Medium creates an image that contains a noticeable amount of compression artifacts but is smaller in size than the Maximum setting.
   - Low creates an image that contains the most amount of compression artifacts but is the smallest file size possible.
2. Choose a JPEG Settings Format Method as follows (44):
   - Progressive creates an image that appears gradually on the page. This is similar to the Interlaced GIF (45).
   - Baseline creates an image that appears all at once, after the entire image has been downloaded.



(43) *The* Image Quality menu *controls the size and the quality of JPEG images.*

(44) *The* Format menu *controls how JPEG images are revealed.*

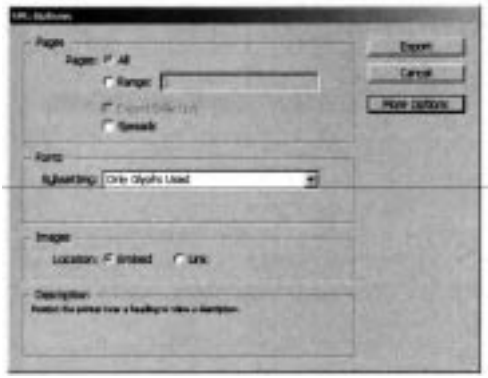
(45) *An example of how a* progressive *JPEG image appears.*

SVG or SVG Compressed?

If you choose to export as SVG, you may wonder about the choice for SVG or SVG Compressed. There is no difference between the settings for SVG or SVG Compressed files. However, SVG Compressed files are smaller.

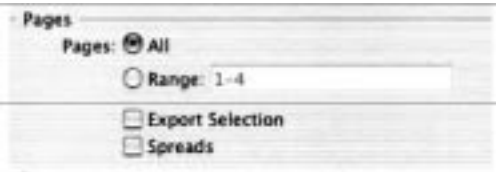
Depending on how you want to use the SVG format, you may not want to compress your SVG files. For instance, the compression may make it harder to edit the SVG file.

Check with your Web designer as to which format you should choose.



46 ***The SVG*** Options dialog box ***contains the controls for creating SVG and SVG Compressed files.***

47 ***The SVG*** Options dialog box ***contains the controls for creating SVG and SVG Compressed files.***



48 *The* **Pages options** *in the SVG Options dialog box let you control which pages are exported into SVG files.*

Exporting SVG Files

InDesign also lets you export documents in the SVG (scalable vector graphics) format that can be viewed on the Web.

To set the basic SVG options:

1. Choose SVG or SVG Compressed from the Save as File Type (Win) or Formats (Mac) menu. The SVG Options dialog box appears **46**. ***(See the sidebar on the opposite page for the difference between the two SVG options.)***
2. Click the More Options button to see the complete set of controls for exporting SVG files **47**.

You can choose which pages or even which selected objects are exported as an SVG file.

To set the area or pages to be converted:

1. In the Pages area, select All to export all the pages in the document **46**.

   or

   Select Range to enter specific pages.

TIP Use the hyphen to select a range of pages such as 4-9, or use commas to enter individual pages such as *3, 8*.

2. If you have any objects **selected,** you can check Export Selection to convert just those objects into an SVG file.
3. Check Spreads to keep pages that are within spreads together in the SVG file.

SVG files can be changed using database publishing. You may want to embed fonts so that there are characters available for the new text.

To set the fonts for an SVG file:

1. In the Fonts area, use the Subsetting menu to choose one of the following ⓲:
   - None (Use System Fonts) does not embed any characters in the file.
   - Only Glyphs Used embeds only the characters in the file. This may limit the ability to edit the text later.
   - Common English embeds all the characters in English documents.
   - Common English & Glyphs Used adds any non-English characters used in the document as well as the Common English characters.
   - Common Roman embeds characters used in Roman language documents.
   - Common Roman & Glyphs Used adds characters used to Common Roman.
   - ***All*** Glyphs uses all characters in a font such as characters in Japanese fonts.

You can also control how placed images are embedded within an SVG file.

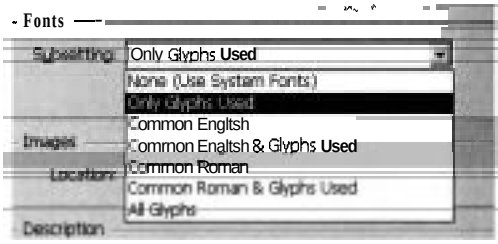
To set the images for an SVG file:

1. In the Images area, choose Embed to add the image into the SVG file ⓳.

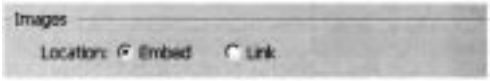
   or

   Choose Link to have the image exist outside the SVG file.

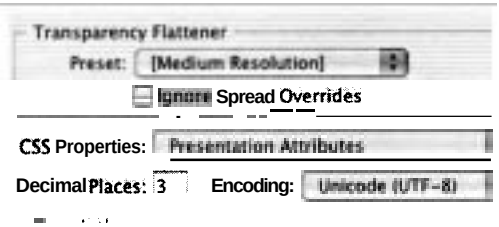
TIP Use the Link setting if you have many SVG files that use the same image.



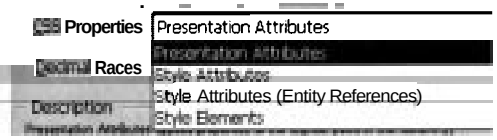
⓲ *The* Fonts Subsetting menu *lets you choose how much of a font is embedded in a SVG file.*



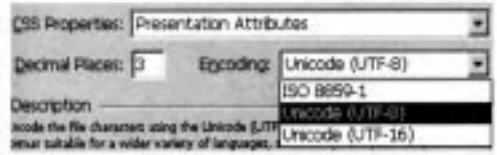
⓳ *The* Images Location controls *let you choose to embed or link images in the SVG file.*



51 ***The*** additional options ***for exporting an SVG file.***



52 ***The CSS*** Properties ***let you choose how much of a font is embedded in a SVG file.***



53 ***The*** Encoding menu ***lets you choose how much of a font is embedded in a SVG file.***

If you select the More Options button, you have two additional sets of controls for SVG files **51**. The Transparency Flattener section is identical to the controls in the Print dialog box (see ***page 435)***. You can also control the CSS (Cascading Style Sheet) properties in the exported SVG document.

To set the CSS properties:

- Choose one of the following from the CSS Properties menu **52**:
  - Presentation Attributes has the highest level of properties and allows the most flexibility during editing.
  - Style Attributes creates a slightly larger file but is necessary if the file is used in XSLT (Extensive Stylesheet Language Transformation).
  - Style Attributes (Entity References) creates a smaller file.
  - Style Elements is used when sharing files with GoLive document.

You can also set how precisely the curves are drawn for vector shapes in the SVG file.

To set the decimal precision:

- Enter a value of 1 to 7 in the Decimal field to set how precisely the curves should be drawn.

TIP The highest value results in a larger file size but creates the best image quality.

You can choose the encoding for the character set in the SVG file. Ask your Web designer which encoding is preferred.

To set the encoding:

- Choose one of the following from the Encoding menu **53**:
  - ISO 8859-1 uses ASCII character encoding.
  - Unicode (UTF-8) uses an 8-bit level of Unicode encoding.
  - Unicode (UTF-16) uses an 16-bit level of Unicode encoding.

Exporting Text

You may find it necessary to export text from InDesign. For instance, you may want to send the text to someone who works with Microsoft Word. You can send them a text file by exporting the text.

To export text:

1. Place an insertion point inside the frame that contains the text. All the text within that story will be exported.

TIP Select an area of text to export only that portion of the text.

2. Choose File >Export. This opens the Export dialog box.
3. Choose a text export format:
   - **Rich** Text Format keeps **all** the styles and text formatting. This format can be opened by most word processors, especially Microsoft Word.
   - Text exports only the characters of the text and discards any styles and text formatting. Use this option only if you want to strip out the text formatting or if the application you are working with does not support the Rich Text Format.
   - **InDesign** Tagged Text format exports the text with special codes for local character formatting and styles. ***(See page 350for more information on working with the tagged text.)***
4. Name the file and choose a destination.
5. Click Save to export the file.

Working with InCopy

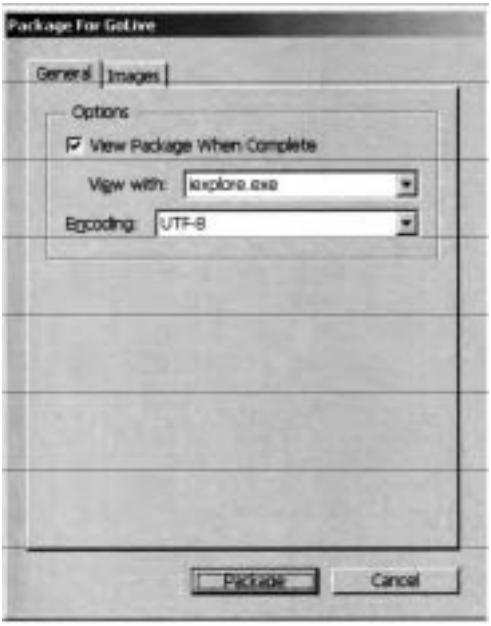
In addition to exporting stories as text files, you can also export them for use with Adobe InCopy. InCopy is the word processing and editing program that works in tandem with InDesign.

A designer lays out InDesign pages and then exports them to InCopy. A writer or editor can work on the text for those pages. The designer doesn't have to worry that the writer will inadvertently move something or change the layout. And the writer has many more word processing tools than are available in InDesign.

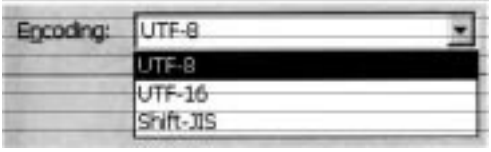
For instance, InCopy lets you edit text using automation text macros, dynamic spell checking, a built-in Thesaurus, and power Find/Change controls. You can even track changes using electronic notes.

If you are using InCopy, you will find many of its commands and tools very similar to the ones described in this book. There are other commands, however, that are unique to InCopy.

There are two ways to purchase InCopy. If you are a small company with just a few designers and editors, you can purchase InCopy directly from Adobe. If you are a large organization, you should consider one of the systems integrators who can configure InDesign and InCopy specifically for your needs. See the Adobe Web site (www.adobe.com) for more information.



54 ***The*** Package for GoLive dialog box ***lets you control how InDesign documents are converted to Web pages.***



55 ***The*** Encoding menu ***in the Package for GoLive dialog box.***

Packaging for GoLive

One of the great struggles in desktop publishing is how to convert print publications into a format that can be viewed on the Web. Perhaps the best way to convert InDesign documents for the Web is to use the Package for GoLive command.

TIP Obviously the GoLive package has been designed especially for use with Adobe GoLive CS. However, the files in the GoLive package are saved in formats such as HTML, XML, JPEG, and GIF. These files can be opened or used by many other applications.

The General area sets the most basic options for the GoLive package **54**.

To package a file to be opened by GoLive:

1. In the General area, use the View with menu to choose the browser to use to view the finished package **55**.
2. Choose View Package When Complete to see the finished packaged file.

TIP Deselect this option to create the package without viewing it.

3. Choose one of the options from the Encoding menu. Ask the Web master for your site what this setting should be so that it matches the encoding of the GoLive Web Page.

Designing documents for use in Adobe GoLive

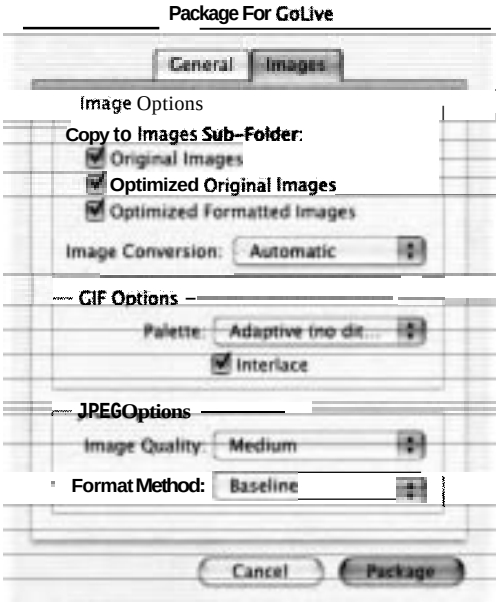
The Package for GoLive feature can't maintain every attribute of your InDesign layout. Package for GoLive uses CSS (Cascading Style Sheets) to preserve typeface (if available on the viewer's computer), size, leading, underline and strike through, alignment, indents, space before and after paragraphs, and text color.

Attributes not preserved in CSS include baseline shift, ligatures, tracking, kerning, paragraph rules, justification, hyphenation, no-break settings, keep options, and tab positions.

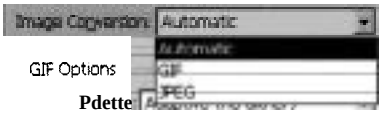
The Images area sets how images will be created in the GoLive package 56.

To set how images are copied into the package:

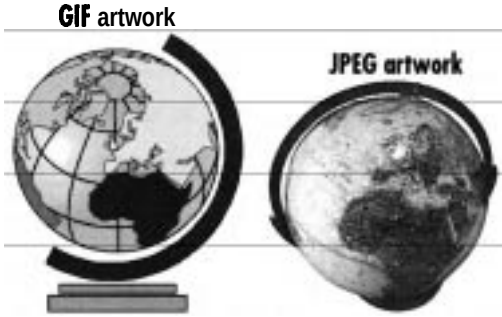
1. Choose one of the following for the Copy to Images Sub-Folder:
   - Original Images copies the same files used in the InDesign document. Use this if you want to have GoLive handle the optimization.
   - Optimized Original Images creates low-resolution Web format files.
   - Optimized Formatted Images creates low-resolution images that contain any effects or formatting applied in InDesign.
2. Use the Image Conversion menu to control how the optimized images are converted to Web format files 57:
   - **Automatic** lets InDesign choose which type of image, GIF or JPEG, should be used.
   - GIF forces all images to the GIF format, which is usually better for artwork that has flat colors or limited shadows and gradients 58.
   - JPEG forces all images to the JPEG format, which is usually better for photographic images 58.



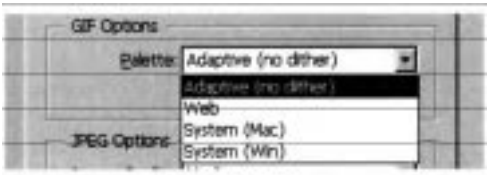
56 *The* Images area *of the Package for GoLive dialog box.*



57 *The* Image Conversion menu *in the Package for GoLive dialog box.*



58 *A comparison of which type of artwork looks better as a GIF or as a JPEG.*



59 *The GIF* Options Palette menu in *the Package for GoLive dialog box.*

You can use the GIF Options to set how GIF images are created.

To set the GIF options:

1. Use the GIF Settings Palette menu to control the type of colors in the GIF image as follows 59:
   - Adaptive (no dither) creates a representative sample of colors. This is the best choice to keep the appearance of the original image.
   - Web limits the colors to the 216 Web-safe colors that are present in both the Macintosh and Windows operating systems. This may cause a speckled appearance for some colors.
   - System (Win) or System (Mac) limits the colors to the built-in colors for the designated computer system.
   - Exact uses only those colors that are exactly in the graphic, up to 256 colors.
2. If you choose Adaptive or Exact, set the GIF Settings Color Depth to the number of colors.
3. Check Interlace to create an image that appears gradually on the page.

The JPEG settings are the same as the ones used in the JPEG Export dialog box (see page 467).

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CUSTOMIZING INDESIGN 20

Working with computer software is a personal thing. I'm always impressed with how emotional students are about how their software should work. One student may hate the way a certain feature works; yet another may insist it's his favorite thing in the entire program.

The InDesign team recognizes that some people want the program to work one way, and others want it exactly the opposite. That's why there are many ways to customize the program. You can change the keyboard shortcuts so that they are similar to other software you use. You can modify the settings for the displays of images and onscreen elements. You can control how text wraps around other objects. You can even set the software to automatically update itself so that it is always current.

It's all your choice.

Modifying Keyboard Shortcuts

Keyboard shortcuts are the fastest way to invoke program commands. However, if you are used to working with other programs, your fingers may be trained to use those other shortcuts. InDesign lets you change the keyboard shortcuts to keystrokes that match your preferences.

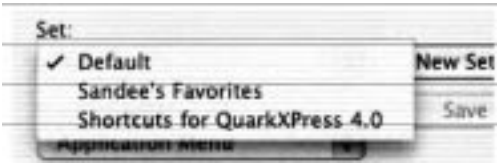
InDesign ships with two sets of shortcuts. The default set is the one that you have when you first use InDesign. This set uses most of the shortcuts found in Adobe products such as Adobe Illustrator or Adobe Photoshop. The other set contains the shortcuts used in QuarkXPress 4.0.

To choose the QuarkXPress shortcut set:

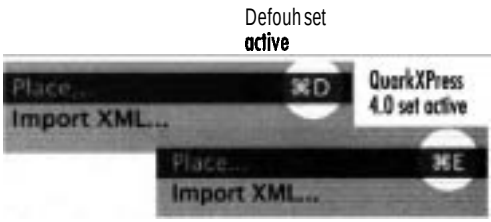
1. Choose Edit >Keyboard Shortcuts. The Keyboard Shortcuts dialog box appears ❶.
2. Choose Shortcuts for QuarkXPress 4.0 from the Set menu ❷.
3. Click OK. The new shortcuts appear in the menus ❸.

TIP Some keyboard shortcuts are "hard wired" to the program and do not change to match the keystrokes in QuarkXPress. For instance, the Zoom tool does not change to the XPress Control key (Mac) or Ctrl-Spacebar (Win) shortcuts.

❶ *The* **Keyboard Shortcuts dialog box** *lets you change the shortcuts used for commands, tools, andpalettes.*



❷ *The* **Set menu** *lets you choose a set of keyboard preferences.*



❸ *You can switch the InDesign default shortcuts to the set for the QuarkXPress 4.0 keyboard commands.*

❹ *The* **New *Set* dialog** *box lets you name a new shortcut set and choose which set it should be based on.*

Creating Your Own Keyboard Shortcuts

I use quite a few different programs from many different software companies. I've taught QuarkXPress for more than fifteen years. I work with both Adobe Illustrator and Macromedia FreeHand. I also know Adobe Photoshop and Macromedia Fireworks. And I use InDesign to lay out all my books.

I don't change InDesign's keyboard shortcuts to follow all those other programs. I find it easier to concentrate on learning InDesign's shortcuts.

If you work with other programs such as Macromedia FreeHand, you may want to create your own shortcut set to match it.

To create a new shortcut set:

1. Choose Edit >Edit Shortcuts.
2. Choose New Set. This opens the New Set dialog box ❹.
3. Enter a name for the set.
4. Choose a set that the new set will be based on.

TIP A set must be based on another set so that it starts with some shortcuts. However, if you later change something in the original set, the one that was based on it does not change.

5. Click OK. You can now edit the set as described on the next page.

If you want a list of keyboard shortcuts to print out and post next to your computer, you can create a file with all the shortcuts.

To create a list of the keyboard shortcuts:

1. Choose Edit >Edit Shortcuts.
2. Use the menu to choose the set.
3. Click the Show Set button. This opens the list of shortcuts.

TIP The list of shortcuts is opened in the following applications:

- Notepad (Win)
- TextEdit (Mac OS X)

4. Print the text file.

You can change the shortcut applied to a command. However, not **all** commands have shortcuts assigned to them. So you can also assign a shortcut to commands.

TIP You can change the keyboard command shortcuts for any set except the Default or QuarkXPress sets.

To change or assign a shortcut:

1. Choose a shortcut set in the Keyboard Shortcuts dialog box.

   or

   Create a new set.
2. Use the Product Area menu to choose the part of the program that contains the command to which you want to assign a shortcut ❺.
3. Choose a command from the list under the Product Area menu ❹.
4. Use the Context menu to choose in what portion of the program the keystroke will work ❼.
5. Click inside the New Shortcut field to make that field active.
6. Press the keys on the keyboard that you want to assign to invoke the command.

TIP If the keystroke is already assigned to another command, the command that uses the shortcut is listed in the Currently Assigned To area ❽.

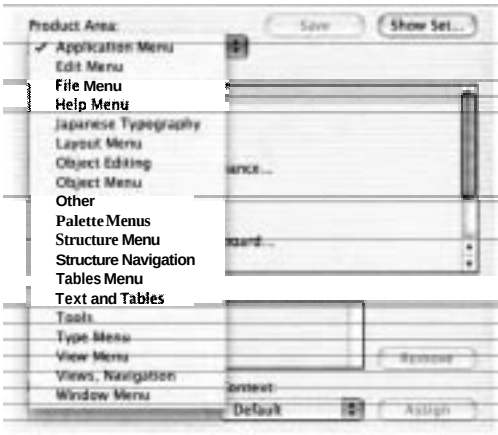
7. Change the keys if necessary by selecting them and typing a new combination.

   or

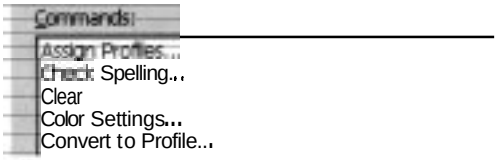
   Click Assign to apply the new shortcut.
8. Click Save to save the set as modified.

To delete a set:

1. Use the Set menu to choose the set you want to delete.
2. Click the Delete Set button.

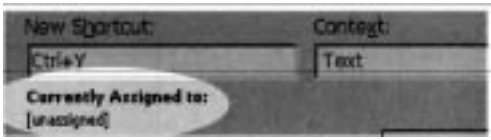


❹ *The* Product Area menu *lets you choose which parts of the program you want to change.*

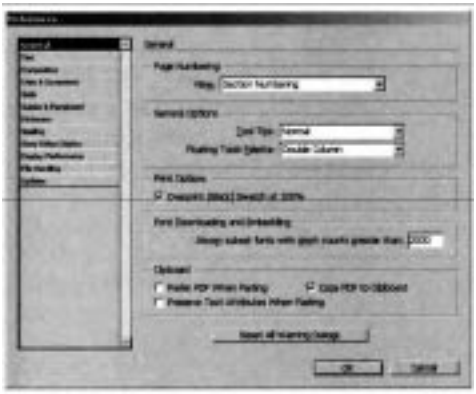


❺ *The* Commands field *contains a list of the commands available for a specific product area.*

❼ *The* Context menu *lets you choose in which context a keyboard shortcut is applied.*



❽ *The* Currently Assigned to area *shows what command a keystroke is assigned to.*



❾ *The* Preferences dialog box *set to the General category.*

Setting the Preference Categories

InDesign has nine different categories that let you customize how the program works.

To choose a preference category:

1. Choose Edit >Preferences (**Win**) and then choose one of the preferences categories. This opens the Preferences dialog box ❾.

   or

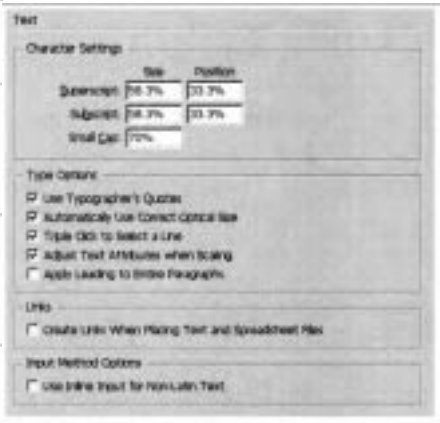
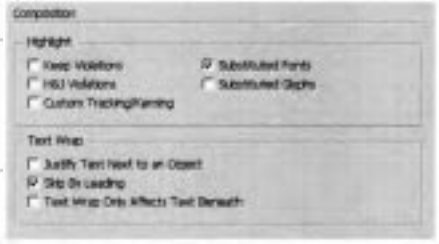
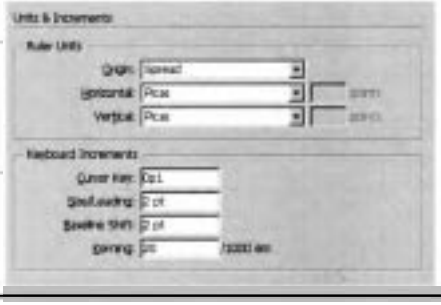
   Choose **InDesign** >Preferences (Mac) and then choose one of the preferences categories.

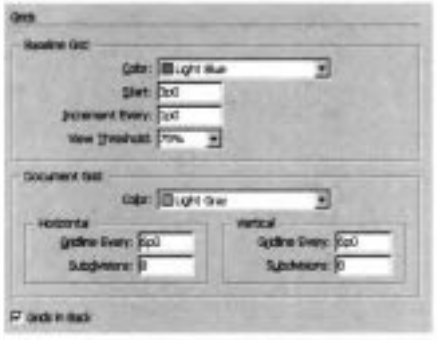
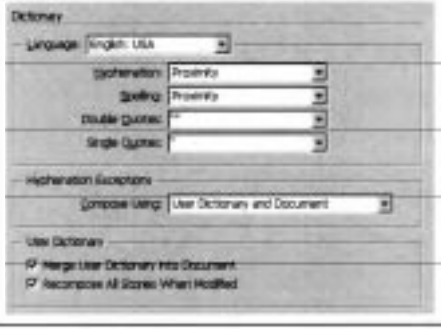
2. Click the categories on the left side of the dialog box to open a new category ❿. ***(See the chart below for the settings for each category and its description.)***

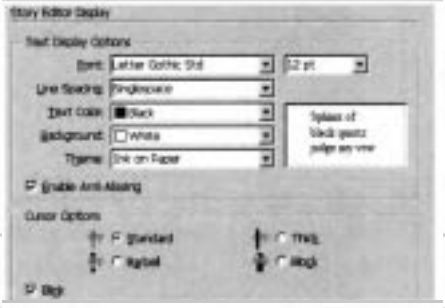
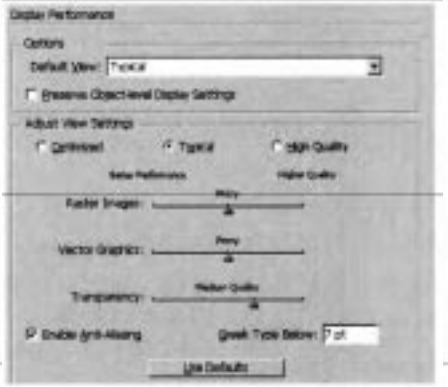
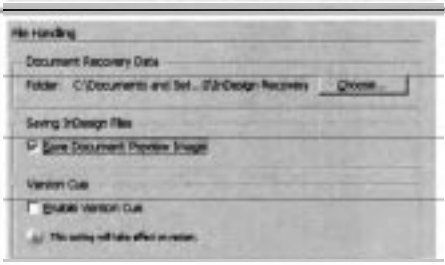
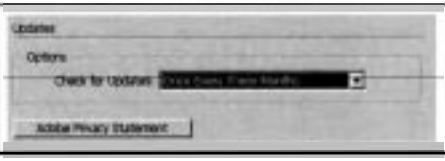
❿ *The* preferences categories *in the Preferences dialog box.*

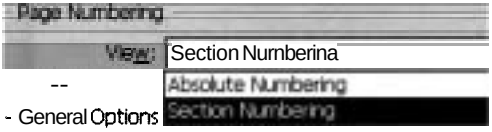
The 12 Preference Categories

Print Category	Settings	Comment
General		The General preference *(see page* 485) contain the settings for page numbering, tool tips and tool palette, printing, font embedding, clipboard, and warning dialog boxes.

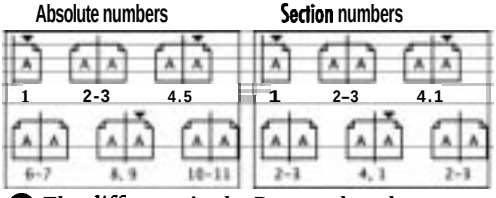
Print Category	Settings	Comment
Text		The Text preferences ***(see page 488)*** control the settings for electronic character formatting, how imported text is linked, and input of non-Latin text.
Composition		The Composition preferences ***(seepage 490)*** control which text problems are highlighted and the rules for text wraps.
Units & Increments		The Units & Increments preferences ***(seepage*** 492) let you set the units for rulers, palettes, and dialog boxes, as well as how much keyboard shortcuts move and modify items.

Print Category	Settings	Comment
Grids		The Grids options *(see page 493)* let you set the colors and increments for the baseline grid and document grid.
Guides & Pasteboard		The Guides & Pasteboard preferences *(see page 494)* let you set the colors for guides, the snap zone for guides, and the height of the pasteboard.
Dictionary		The Dictionary preferences *(see page 496)* let you choose the default language, the hyphenation exceptions, and how to work with a custom user dictionary.

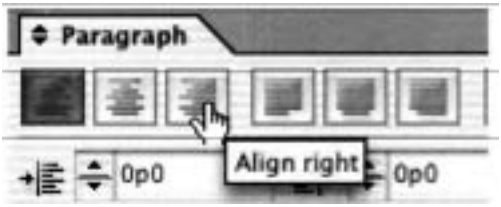
Print Category	Settings	Comment
Spelling		The Spelling preferences *(see page 497)* let you refine what problems are found during a spell check.
Story Editor Display		The Story Editor preferences *(see page 326)* let you change the display of the Story Editor.
Display Performance		The Display Performance preferences *(see page 497)* control the settings for how placed images, artwork, and special effects are displayed on the screen.
File Handling		The File Handling preferences *(see page 499)* control where back up and saved data are located.
Updates		The Updates preferences *(see page 500)* let you set when InDesign checks for new versions.



⓫ *The* Page Numbering View menu *lets you choose the section numbers or absolute numbers.*



⓬ *The difference in the Pages palette between using absolute numbers and section numbers. The black triangles indicate the start of a new section.*



⓭ *An example of a* Tool Tip *that appears when you pause over an interface element.*

General Preferences

Ordinarily, you want page numbers to be displayed in the Pages palette according to their section numbers *(seepage* 251). This usually starts at number 1 and ends with the last page of the document. However, if you have several sections in the same document, they could all have a page number 1. The page numbering preferences change how the page numbers are displayed.

To set the page number preferences:

- Choose one of the following from the Page Numbering View menu ⓫:
  - Absolute Numbering ignores any section numbers and uses the physical placement number of the page in the document ⓬. Use this if you want to print a page that has the same number as another page in a separate section.
  - Section Numbering uses the numbers set from the section options ⓬.

Tool Tips are explanations and notes that appear when you pause your cursor over a tool or onscreen element. You can control how fast Tool Tips appear.

To control the Tool Tips:

- Use the Tool Tips menu to choose one of the following ⓭:
  - Normal waits a moment before displaying the tip.
  - None turns off the display of the tips.
  - Fast displays the tips almost immediately after the cursor pauses over the tool or feature.

You can also change the orientation and arrangement of the Toolbox.

To change the display of the Toolbox:

- Use the Floating Tools Palette menu to choose how the Toolbox is displayed ⓮:
  - Single Column displays the palette in a single vertical column ⓯.
  - Double Column displays the palette in two vertical columns ⓯.
  - Single Row displays the palette in a single horizontal row ⓯.

TIP You can also change the shape of the Toolbox by double-clicking the Toolbox title bar.

The Print Options control how InDesign prints documents.

To set the print options:

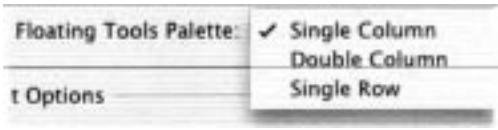
- Choose Overprint Black to have all black ink automatically overprint any other colors it passes over ⓰. (See *Chapter 18, "**Output**" for more information on preparing a file for printing.)*

The Font Downloading and Embedding section controls the threshold below which a font is subset.

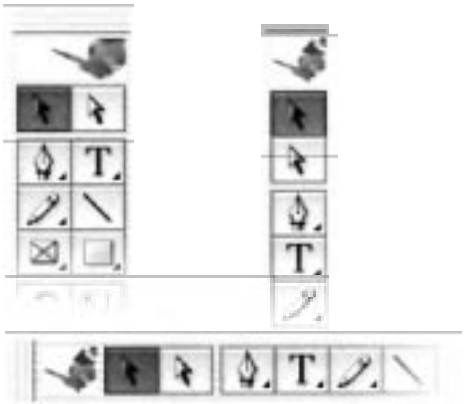
To choose the threshold for font subsetting:

- Enter an amount in the Always Subset Fonts With Glyph Counts Greater Than field ⓱.

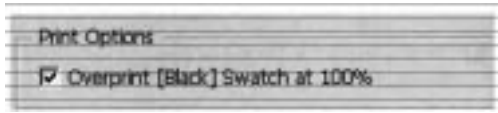
TIP A number such as 2,000 ensures that fonts with large character sets are always subset, creating smaller files. But custom fonts with only one or two characters are sent in their entirety. (The word TIP in this book is such a custom, single-character font.)



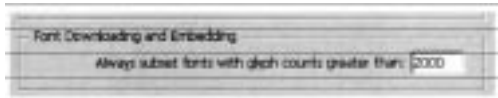
⓮ *The* Floating Tools Palette menu *lets you choose the **configuration** of the Toolbox.*



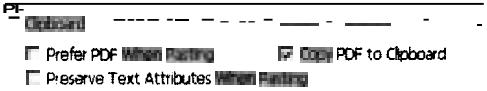
⓯ *The* three arrangements *for the Toolbox.*



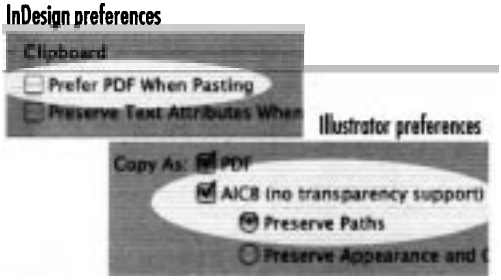
⓰ *The* Print Options *let you set the color black to overprint other colors.*



⓱ *The* Font Downloading and Embedding *lets you control if fonts are embedding or subset.*



⓲ ***The*** Clipboard options ***let you control the type of information that is copied from InDesign or pasted into InDesign.***



⓳ ***The InDesign and Illustratorpreference settings allow you to*** paste Illustrator art as **editable** InDesign paths.

⓴ ***Click the*** Reset All Warning Dialogs ***to bring back those annoying alert messages when you perform certain actions.***

The clipboard contains the information stored during a copy or cut command. You may need to change the options for what type of information is included in the clipboard. This is especially helpful when pasting objects to and from Adobe Illustrator and InDesign.

To set the clipboard format:

- Check the Clipboard options as follows ⓱:
  - Prefer PDF When Pasting lets you add Illustrator graphics as self-contained PDF files that retain **all** the effects such as transparency and drop shadows, applied to the PDF. Deselect this option in order to copy and edit paths from Illustrator or Photoshop. Also, in Illustrator, you must change its Clipboard preferences to AICB (no transparency): Preserve Paths before you copy the item ⓱.
  - Copy PDF to Clipboard lets you copy data as complete PDF files. Select this option in order to copy and paste paths from InDesign into Illustrator or Photoshop.
  - Preserve Text Attributes When Pasting maintains the formatting of text that is pasted from e-mail or word processing applications. Deselect this option in order to have InDesign's formatting override the text formatting.

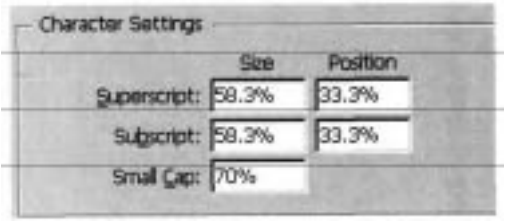
Every once in a while you may see a dialog box that warns you about doing something. These alerts have boxes you can check so you never see the warning again. If you've turned them off, you can reset them all to turn back on.

To reset the warning dialog boxes:

- Click the Reset All Warning Dialogs button at the bottom of the General preferences ⓴. An alert box informs you that you will now see the warnings.

Text Preferences

The Character Settings control the size and position of superscript, subscript, and small cap characters ㉑. *(See page 55 for working with the superscript, subscript, and small cap characters.)*



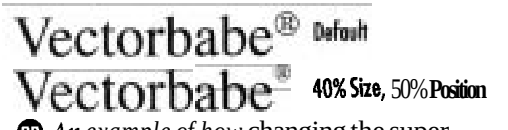
㉑ *The* Character Settings *control the size and position of superscript, subscript, and small cap characters.*

To set the character settings preferences:

1. Enter amounts in the Size field to control the size of the characters ㉒.
2. Enter amounts in the Position field to control how far above or below the baseline the characters are positioned ㉒.

TIP The percentage amount is based on the total space between the two lines.

Use the Type Options controls for working with text ㉓.



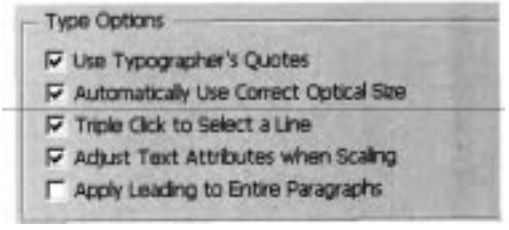
㉒ *An example of how* changing the superscript size and position *makes* a *registered mark less obnoxious.*

To set the type options preferences:

1. Use Typographer's Quotes automatically changes typewriter quotes into the proper curly quote characters ㉔.
2. Automatically Use Correct Optical Size sets the correct value for the optical size of Multiple Master fonts.
3. Triple Click to Select a Line does the following:
   - Three clicks selects a line.
   - Four clicks selects a paragraph.
   - Five clicks selects the story.

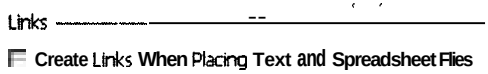
TIP If this option is unchecked, three clicks selects the paragraph and four clicks selects the story.

4. Adjust Text Attributes when Scaling lets the text point size increase or decrease when scaled.
5. Apply Leading to Entire Paragraphs lets InDesign work more like QuarkXPress.

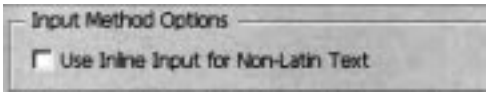


㉓ *The* Type Options *let you change the preferences for how text is set.*

㉔ *An example of using* typographer's quotes.



25 ***The*** Create Links When Placing Text and Spreadsheet Files ***lets you control if text documents are linked to their original files.***



26 ***The*** Input Method Options ***control how non-Latin language fonts are set.***

Previous versions of InDesign would automatically link text and spreadsheet documents back to their original file. While some people might have found this a good workflow, it also could cause problems when the document was sent to others for final output. The Links options lets you control if placed text files are automatically linked to their original source.

To choose if text files are linked or embedded:

- Click the option Create **Links** When Placing Text and Spreadsheet Files to link those styles back to the original files 25. This allows you to make changes to the word processor or spreadsheet file and have them update automatically in InDesign.

TIP If you do update the file in InDesign, all local formatting you have applied will be discarded when the text is updated.

A non-Latin typeface is one that uses 2-byte and 4-byte characters. Japanese, Korean, and Chinese are examples of non-Latin typefaces. If you work with non-Latin typefaces, you may need to use features in the operating system to enter characters instead of the keyboard.

To use the system to enter non-Latin text method:

- Click the option Use **Inline** Input For Non-Latin Text to allow you to input text using the operating system features 26.

Composition Preferences

The Highlight settings let you control which parts of the text are highlighted to indicate composition or typographic violations or substitutions 27.

To set the highlight options:

- Set the Highlight options as follows 28:
  - Keep Violations displays lines that have been broken in violation of the Keep With settings that you chose for the paragraph options *(see page 353)*.
  - H&J Violations highlights those areas that violate the hyphenation or justification controls *(see page 360)*.

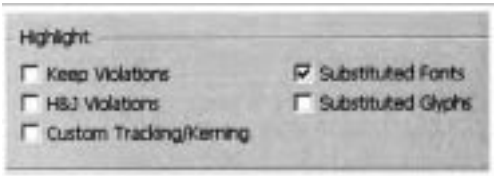
TIP H&J Violations occur when InDesign has no other way to set the text except to break the H&J controls.

  - Custom Tracking/Kerning highlights the text with tracking or kerning applied to it *(see page 57 and* 58).
  - Substituted Fonts highlights characters that are substituted for a font that is not installed in the computer system *(see page 352)*.

TIP This is the famous pink highlight that many people see when they import text or change typefaces.

TIP If the shape of the uninstalled font exists in the Adobe Type Manager database, the shape of the font is approximated. If not, a default font is used.

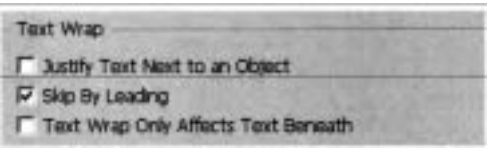
  - Substituted Glyphs highlights Open Type characters that have been substituted with alternate glyphs *(see page 368)*.



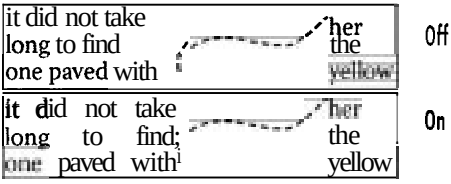
27 *The* Highlight Settings *let you choose which typographic problems are displayed with a highlight.*

low bricks one by one. She started slowly at first, but then started to walk faster

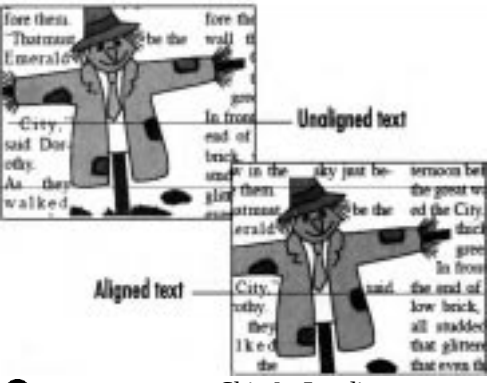
28 *An example of text with a* highlight *applied.*



28 ***The*** Text Wrap controls ***in the Composition category.***



29 ***The effect of setting the*** Justify Text Next to an Object.



31 ***Notice how, when*** Skip ***by*** Leading ***is turned off; the text does not line up across columns. And when it is turned on, the text does line*** **up.**

You can also control the effect of the Text Wrap settings and how text wraps around objects **28**.

To set the text wrap options:

- Choose one of the following from the Text Wrap options:
  - Justify Text Next to an **Object** forces text next to an object to be justified if it wraps around an object inside the frame **30**.
  - Skip by Leading forces text that has wrapped around an object to move to the next available leading increment. This avoids problems where text may not line up across columns or frames **31**.
  - Text Wrap Only Affects Text Beneath causes InDesign text wrap to only work on text below the object, rather than text above and below the object. Turn this setting on to have InDesign work more similarly to QuarkXPress.

Units & Increments Preferences

All the art directors I ever worked with specified measurements in picas and points. But you may feel more comfortable working in inches, centimeters, or something else. The Ruler settings let you specify the units for rulers.

To set the ruler units:

1. Use the Origin menu to select one of the following 32:
   - Spread sets the horizontal ruler to stretch across the pages in a spread.
   - Page sets the horizontal ruler to reset for each individual page in a spread.
   - Spine sets the horizontal ruler to stretch across the spine of the document.
2. Use the Horizontal or Vertical menus to select the unit of measurement for each of the rulers 33. *(See page 26 for more information on setting the ruler units.)*

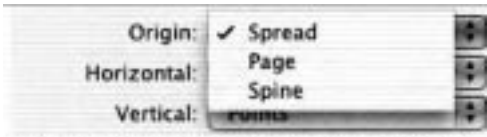
   or

   Set an amount, in points, for a custom unit of measurement 34. For instance, a Custom setting of 14 points means each tick mark on the ruler is 14 points 35.

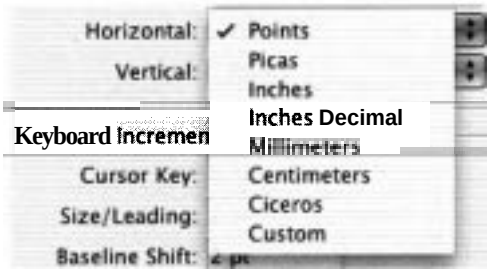
There are several keyboard shortcuts *(see the Appendix)* you can use to move objects, or increase text settings. The keyboard increments control how much the objects move or the text changes 36.

To set the keyboard increments:

- Enter an amount in the fields as follows:
  - Cursor Key lets you choose the amount that the arrow keys should nudge objects.
  - **Size/Leading** controls the amount that the type size and leading changes.
  - Baseline Shift lets you set the amount that the baseline shift changes.
  - Kerning controls the amount that the kerning changes.

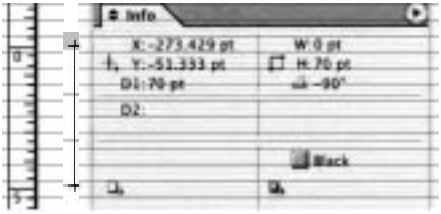


32 *The* **Origin menu** *lets you choose how the rulers stretch across the page.*

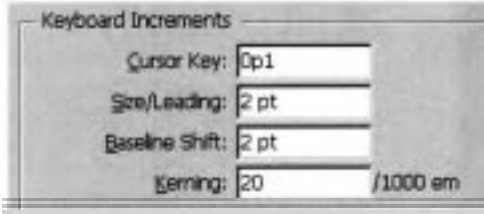


33 *The* Ruler Units menu *lets you choose a unit of measurement for the horizontal or vertical menus.*

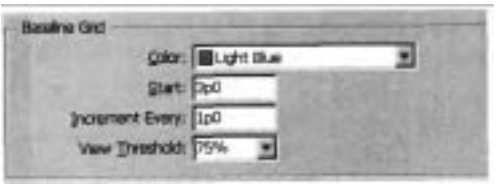
34 *The* Custom menu *lets you choose how many points per tick appear on the ruler.*



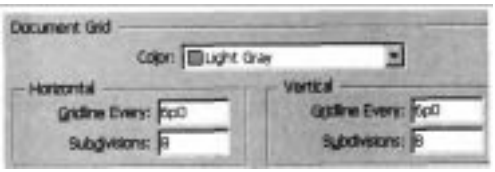
35 *A custom ruler unit of 14 points means that each major tick on the ruler represents* ***14 points****. Here* 5 *tick marks measure* ***70 points****.*



36 *The* Keyboard Increments fields *in the Units & Increments category.*



37 *The* Baseline Grid controls *in the Grids category.*



38 *The* Document Grid controls *in the Grids category.*

39 *The* Grids in Back option *in the Grids category.*

Grids Preferences

The Baseline Grid options let you control the color and position of the baseline grid which is used to align text across frames and columns. Change these preferences when the default color is difficult to see on the screen 37.

To set the baseline grid options:

1. Use the Color menu to choose a color for the baseline grid.
2. Enter a value for each of the fields as follows:
   - Start positions where the grid should start on the page.
   - Increment Every sets the distance between the lines of the grid.
   - View Threshold sets the lowest magnification at which the grid is visible.

To set the document grid preferences:

1. Use the Color menu to choose a color for the document grid 38.
2. Enter a value for the Horizontal and Vertical fields as follows:
   - **Gridline** Every sets the distance between the major lines of the grid.
   - Subdivisions sets the number of secondary lines of the grid.

To set the positioning of the grids:

- Check Grids in Back to position the grids behind graphics and text 39.

Guides & Pasteboard Preferences

The Colors area is a rainbow of choices for how to color onscreen guides and areas ⑩.

To set the onscreen elements colors:

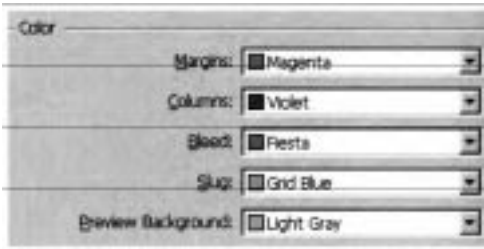
- Use the menus to set the colors for each of the following:
  - Margins sets the color of the guides created by the margins settings *(see page 21)*.
  - Columns sets the color of the guides created by the column setting *(see page 21)*.
  - Bleed sets the color of the guide around the bleed area *(see page 35)*.
  - Slug sets the color of the guide around the slug area *(see page 35)*.
  - Preview Background sets the color of the area that surrounds the page in the preview mode *(see page 36)*.

To set the Guide Options:

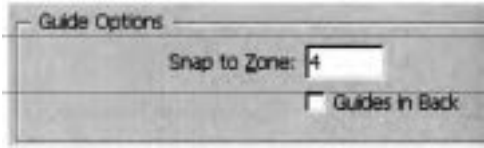
1. Use the Snap to Zone field to set how close the objects should be when they snap to guides ⑪. This amount is set in pixels.
2. Check Guides in Back to hide the guides when they appear behind objects.

To set the Pasteboard Options:

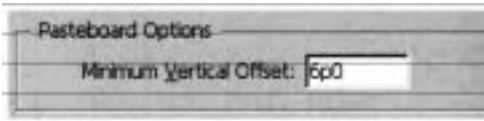
- Enter an amount in the Minimum Vertical Offset to increase or decrease the amount of pasteboard space above and below the page ⑬.



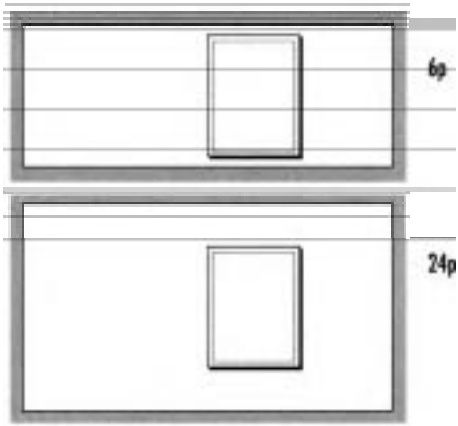
⑩ *The* Margins Color menu *in the Guides category.*



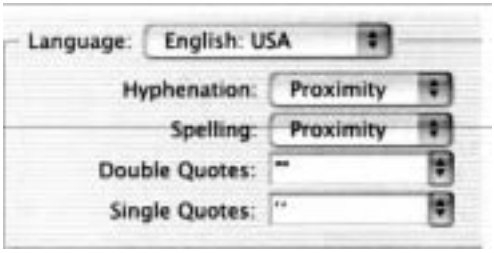
⑪ *The* Guide Options *in the Guides category.*



⑫ *Use the* Minimum Vertical Offset *to control how tall the pasteboard area is.*

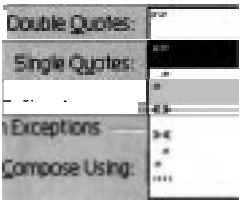


⑬ *The effect of* ***increasing*** *the minimum vertical offset.*

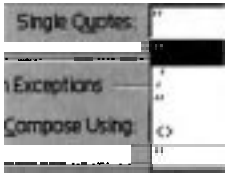


44 *The* Language controls *in the Dictionary category.*

Double auote choices



Single quote choices



45 *The* Quote menus *in the Dictionary category.*

Dictionary Preferences

The language settings are used for checking spelling as well as hyphenation and quotation marks 44.

To set the language options:

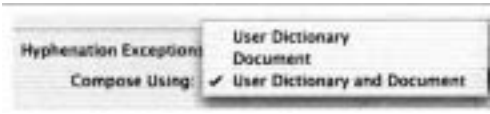
1. Use the Language menu to set the default.

TIP If you do not see any other languages in the Language menu, you need to do a custom install from the InDesign installer CD.

2. If you have installed special hyphenation preferences, choose a preference from the Hyphenation menu.
3. If you have installed special spelling preferences, choose a preference from the Spelling menu.
4. Use the Double Quotes menu to choose the characters for double quotation marks.
5. Use the Single Quotes menu to choose the characters for single quotation marks.

TIP The Quotes menus list the quotations used for different languages, such as Spanish and French. Or you can enter your own special characters in the field 45.

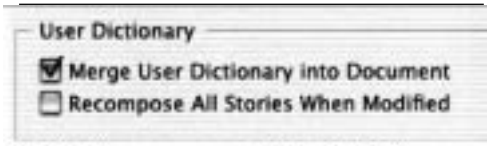
The hyphenation exceptions let you choose to apply the hyphenations created by editing the Dictionary *(seepage* 366) or those built into the application.



46 *The* Composition Using **menu** *in the Dictionary category.*

To set the hyphenation exceptions:

- Choose one of the following from the Compose Using menu 46:
  - User Dictionary uses only the hyphenation exceptions set by editing the Dictionary.
  - Document uses the hyphenation exceptions list stored inside the document. *(See the next exercise for how to add the user dictionary hyphenation exceptions into a document.)*
  - User Dictionary **and** Document merges the exceptions in both the document and the user dictionary. This is the default setting.



47 *The* **Language controls** *in the Dictionary category.*

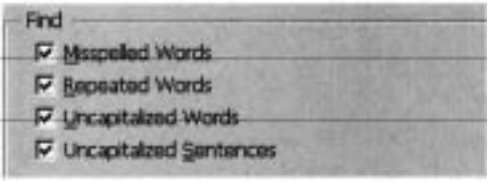
The User Dictionary options let you merge hyphenation exceptions into a document and create new hyphenation exceptions that affect the document 47.

To set the user dictionary preferences:

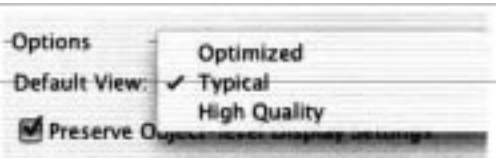
1. Merge User Dictionary into Document adds the hyphenation exceptions in the user dictionary into the document. This is on by default.

TIP This is especially useful if you send the native InDesign document to a service bureau for output.

2. Recompose All Stories When Modified applies the new exceptions in the user dictionary to **all** the stories in the document.



48 *Use the* Find controls *in the Spelling category to choose which words are flagged during a spell check.*



49 *The* Default View Settings controls *in the Display Performance category.*

Spelling Preferences

The Find section of the Spelling preferences control what types of problems the Spell Checker flags during a spell check 48.

To set the Find options for Spelling:

1. Select Misspelled Words to find words that are not known in the spelling dictionary.
2. Select Repeated Words to find instances of words that are repeated, such as "the the Spell Checker."
3. Select Uncapitalized Words to find words that are listed in the dictionary as capitalized. For instance, proper names of countries are capitalized in the dictionary.
4. Select Uncapitalized Sentences to flag uncapitalized words that begin sentences. For instance, the figure numbers I use in this book are interpreted by the Spell Checker as uncapitalized sentences. So I can turn off this option to avoid having those numbers flagged.

Display Performance Preferences

The default view is the view that is used when documents are first opened.

To set the default view:

1. Use the Default View Settings menu to choose which of the display performance settings is automatically applied to new documents 49.
2. Check Ignore Local Settings to override any individual settings applied to graphics *(see page 211)*.

The Adjust View Settings controls how images appear onscreen for each of the three view choices 49. *(See page 210for more information on working with the Adjust View Settings.)*

To choose the options for Adjust View Settings:

1. Click one of the radio buttons to choose a view setting.
2. Drag the slider controls to set the quality for raster images, vector graphics, and the transparency effects.
3. Repeat for the other two view settings.

TIP It takes longer for the screen to redraw if you choose the highest quality previews.

Anti-aliasing is the term used to described the soft edge applied to either text or graphics @.

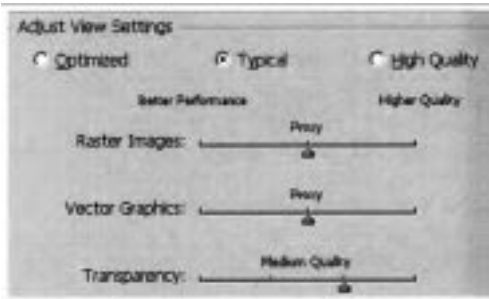
To control the anti-aliasing of text and graphics:

- Check Enable Anti-Aliasing to add a soft edge to the type and graphics displayed on the monitor 52.

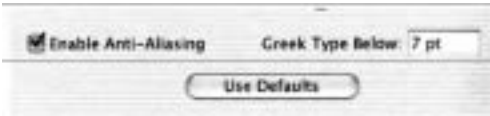
Greeking is the term used to describe the gray band that is substituted for text characters 53.

To set text to be greeked:

- Enter an amount in the Greek Type Below field. This sets the size below which the text characters will be substituted onscreen with gray bands.

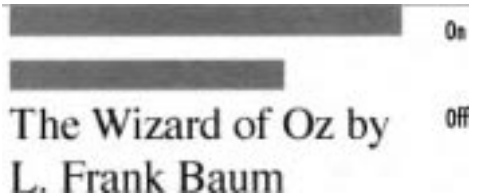


49 *The* **Adjust***View Settings in the Display Performance category,*

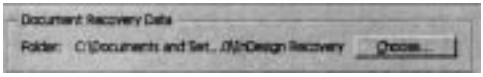


51 *The controls for anti-aliasing, greeking type, and resetting the defaults in the Display Performance category.*

52 *The effect of applying anti-aliasing to type.*



53 *The effect of applyinggreeking to type.*



54 ***The*** Document Recovery Data setting ***lets you choose where to save temporaryfiles that contain recovery data for your current work.***

55 ***The*** Save Document Preview Image option ***lets you add apreview to know what the file looks like before you open it.***

56 ***The*** Version Cue control ***lets you set your copy of InDesign to be part of a collaborative environment.***

File Handling

If InDesign crashes or the computer is shut down before you can save the InDesign documents, a file is created that contains the recovered document. The Document Recovery Data area lets you choose where that recovered document is located.

TIP Although most people will use the same drive that contains the application, this option lets you specify a folder on a drive that has more space than the one that contains the InDesign application folder.

To set the temporary folder:

1. Click the Choose button in the Temporary Folder area **54**.
2. Use the dialog box to choose the location of the recovered documents.

The Saving InDesign Files area lets you add a preview to the saved file.

To add a preview image to the saved file:

- Click Save Document Preview Image to add a preview to the file **55**.

If you work in a collaborative setting, such as a magazine or newspaper, you may want to use the Adobe Version Cue software to help coordinate the various files and document. You can turn on this feature in the Version Cue area.

To set the temprary folder:

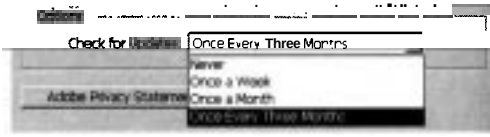
1. Click Enable Version Cue **56**.
2. Restart InDesign to apply the Version Cue software.

Updates Preferences

The Updates preferences controls let you choose how often InDesign checks for new versions of the software.

To set the online controls:

- Choose one of the following from the Update Options menu (57).
  - Never turns off all automatic updates.
  - Once a Day, Once a Week, or Once a Month automatically connects to Adobe Online.



(57) *The* Check for Updates menu *lets you control how often InDesign checks for new update packages.*

Configuring Plug-ins

InDesign uses a large set of plug-ins as its core set of commands and features. You may want to control which plug-ins are loaded each time you launch the program.

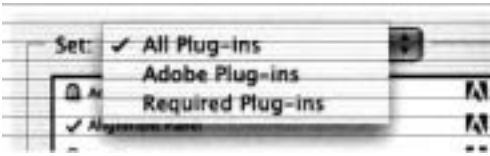
To select the plug-ins set:

1. Choose InDesign >Configure Plug-ins (Mac) or Help >Configure Plug-ins (Win) to open the Configure Plug-ins dialog box (58).
2. Choose a set from the Set menu.

(58) *The* Configure Plug-in dialog box *is where you can control which plug-ins get loaded when you launch InDesign.*

To modify a plug-in set:

1. Select the plug-in set.
2. If the set is one of the default sets, choose Duplicate to make a copy of the set.
3. Click the checkbox column to the left of the name to enable or disable the plug-in from the set.
4. Use the Display checkboxes to see the types of plug-ins.



(59) *The three* default plug-ins sets *cannot be modified.*

To see the information about a plug-in:

- Click the Show Info button in the Configure Plug-ins dialog box to open the Plug-in Information dialog box (60).

KEYBOARD SHORTCUTS

Appendix

As you become more familiar with the various InDesign features, you should start to use the keyboard shortcuts for the commands you use most often. For instance, rather than use the mouse to choose File > Place, it is much faster and easier to press the keyboard shortcut Cmd/Ctrl-D.

This appendix lists the shortcuts for the Default set of menu commands. This is the set that is turned on when you first open InDesign. As shown on pages 478—480, you can change these keyboard commands. However, I find it difficult to search through that dialog box to find a specific command. It's much easier to look through this list in order to find a specific command.

Many of the commands are listed as unassigned. This means that you can enter your own shortcut for those commands.

Some of the shortcuts are context-sensitive—that is, they work only in a certain context. For instance, the shortcut to show or hide all the palettes is listed as the Tab key. However, that shortcut works only if your insertion point is not in a text frame. If it is in a text frame, pressing the Tab key enters a tab stop.

The word *unassigned* next to a command means that the command is available for you to add your own shortcut to it. The word *Default-* in front of a shortcut means that it is used under all circumstances. The word *Text-* in front of a shortcut means that it is used only when inside a text frame. The word *Tables-* in front of a shortcut means that it is used only when inside a table. The letters XML- in front of a shortcut means that it is used when apply XML tags.

Macintosh Shortcuts

The following are the keyboard shortcuts for the Macintosh.

Application Menu

About InDesign	unassigned
Configure Plug-ins	*unassigned*
Preferences > Composition	*unassigned*
Preferences > Dictionary	*unassigned*
Preferences > Display Performance	*unassigned*
Preferences > File Handling	*unassigned*
Preferences > General	*Default-*Cmd+K
Preferences > Grids	*unassigned*
Preferences > Guides & Pasteboard	*unassigned*
Preferences > Spelling	*unassigned*
Preferences > Story Editor Display	*unassigned*
Preferences > Text	*unassigned*
Preferences > Units & Increments	unassigned
Preferences > Updates	unassigned

Edit Menu

Assign Profiles	unassigned
Check Spelling	*Default-*Cmd+I
Clear	*Default-*Delete, *Default-*Cmd+Delete, *Default-*Del, *Default-*Cmd+Del
Color Settings	*unassigned*
Convert to Profile	*unassigned*
Copy	*Default-*Cmd+C
Cut	*Default-*Cmd+X
Deselect *All*	*Default-*Shift+Cmd+A
Dictionary	unassigned
Duplicate	*Default-*Opt+Shift+Cmd+D
Edit in Story Editor	*Default-*Cmd+Y
Find Next	*Default-*Opt+Cmd+F
Find/Change	*Default-*Cmd+F
Keyboard Shortcuts	unassigned
Paste	*Default-*Cmd+V
Paste in Place	*Default-*Opt+Shift+Cmd+V
Paste Into	*Default-*Opt+Cmd+V
Redo	*Default-*Shift+Cmd+Z
Select All	*Default-*Cmd+A
Step and Repeat	*Default-*Shift+Cmd+V
Transparency Blend Space > Document CMYK	unassigned
Transparency Blend Space > Document RGB	unassigned
Transparency Flattener Presets	*unassigned*
Undo	*Default-*Cmd+Z

File Menu

Close	*Default-*Cmd+W
Document Presets > Define	unassigned
Document Setup	Default-Opt+Cmd+P
Export	*Default-*Cmd+E
File Info	unassigned
Import XML	*unassigned*
Library	*unassigned*
New > Book	*unassigned*
New > Document	*Default-*Cmd+N
Open	*Default-*Cmd+O
Package for GoLive	*unassigned*
PDF Export Presets > Define	unassigned
Place	*Default-*Cmd+D
Preflight	*Default-*Opt+Shift+Cmd+F
Print Presets > Define	*unassigned*
Print	*Default-*Cmd+P
Revert	*unassigned*
Save	*Default-*Cmd+S

Save a Copy	*Default*-Opt+Cmd+S
Save a Version	*unassigned*
Save As	*Default*-Shift+Cmd+S
Versions	unassigned

Help Menu

InDesign Help	*Default*-Help
InDesign Online	*unassigned*
Online Support	*unassigned*
Registration	*unassigned*
Report a bug	*unassigned*
Updates	unassigned

Japanese Typography

Delete Glyph Set	*unassigned*
Horizontal	*unassigned*
New Glyph Set	*unassigned*
Vertical	unassigned

Layout Menu

Create Guides	*unassigned*
First Page	*Default*-Shift+Cmd+Page Up
Go Back	*Default*-Cmd+Page Up
Go Forward	*Default*-Cmd+Page Down
Last Page	*Default*-Shift+Cmd+Page Down
Layout Adjustment	*unassigned*
Margins and Columns	*unassigned*
Next Page	*Default*-Shift+Page Down, *Text*-Shift+Page Down
Next Spread	*Default*-Opt+Page Down
Numbering & Section Options	*unassigned*
Previous Page	*Default*-Shift+Page Up, *Text*-Shift+Page Up
Previous Spread	*Default*-Opt+Page Up
Ruler Guides	*unassigned*
Table of Contents Styles	*unassigned*
Table of Contents	*unassigned*
Update Table of Contents	*unassigned*
Update table of contents using current style	*unassigned*

Object Editing

Convert Clipping Path to Frame	*unassigned*
Decrease size/scale by 1%	*Default*-Cmd+,
Decrease size/scale by 5%	*Default*-Opt+Cmd+,
Horizontal Align Center	unassigned
Horizontal Align Left	unassigned
Horizontal Align Right	*unassigned*
Horizontal Distribute Center	*unassigned*
Horizontal Distribute Left	*unassigned*
Horizontal Distribute Right	*unassigned*
Horizontal Distribute Space	*unassigned*
Increase size/scale by 1%	*unassigned*
Increase size/scale by 5%	*Default*-Opt+Cmd+.
Nudge Down	*Default*-Down Arrow
Nudge Down 1/10	*Default*-Shift+Cmd+Down Arrow
Nudge Down 1/10 Duplicate	*Default*-Opt+Shift+Cmd+Down Arrow
Nudge Down Duplicate	*Default*-Opt+Down Arrow
Nudge Down x10	*Default*-Shift+Down Arrow
Nudge Down x10 Duplicate	*Default*-Opt+Shift+Down Arrow
Nudge left	*Default*-Left Arrow
Nudge left 1/10	*Default*-Shift+Cmd+Left Arrow
Nudge left 1/10 Duplicate	*Default*-Opt+Shift+Cmd+Left Arrow
Nudge left Duplicate	*Default*-Opt+Left Arrow
Nudge left x10	*Default*-Shift+Left Arrow
Nudge left x10 Duplicate	*Default*-Opt+Shift+Left Arrow
Nudge right	Default-Right Arrow
Nudge right 1/10	*Default*-Shift+Cmd+Right Arrow

Nudge right 1/10 Duplicate	*Default*-Opt+Shift+Cmd+Right Arrow
Nudge right Duplicate	*Default*-Opt+Right Arrow
Nudge right x10	*Default*-Shift+Right Arrow
Nudge right x10 Duplicate	Default-Opt+Shift+Right Arrow
Nudge up	Default-Up Arrow
Nudge up 1/10	*Default*-Shift+Cmd+Up Arrow
Nudge up 1/10 Duplicate	*Default*-Opt+Shift+Cmd+Up Arrow
Nudge up Duplicate	*Default*-Opt+Up Arrow
Nudge up x10	*Default*-Shift+Up Arrow
Nudge up x10 Duplicate	Default-Opt+Shift+Up Arrow
Select all guides	*Default*-Opt+Cmd+G
Vertical Align Bottom	*unassigned*
Vertical Align Center	*unassigned*
Vertical Align Top	*unassigned*
Vertical Distribute Bottom	*unassigned*
Vertical Distribute Center	*unassigned*
Vertical Distribute Space	*unassigned*
Vertical Distribute Top	*unassigned*

Object Menu

Arrange > Bring Forward	*Default*-Cmd+]
Arrange > Bring to Front	Default-Shift+Cmd+]
Arrange > Send Backward	*Default*-Cmd+[
Arrange > Send to Back	*Default*-Shift+Cmd+[
Button Options	
Clipping Path	Default-Opt+Shift+Cmd+K
Compound > Make	*Default*-Cmd+8
Compound > Release	*unassigned*
Content > Graphic	*unassigned*
Content > Text	*unassigned*
Content > Unassigned	*unassigned*
Convert to Button	*unassigned*
Corner Effects	*unassigned*
Display > Use View Setting	*unassigned*
Drop Shadow	*Default*-Opt+Cmd+M
Feather	*unassigned*
Fitting > Center Content	*Default*-Shift+Cmd+E
Fitting > Fit Content Proportionally	Default-Opt+Shift+Cmd+E
Fitting > Fit Content to Frame	*Default*-Opt+Cmd+E
Fitting > Fit Frame to Content	*Default*-Opt+Cmd+C
Group	*Default*-Cmd+G
Image Color Settings	*unassigned*
Lock Position	*Default*-Cmd+L
Movie Options	*unassigned*
Pathfinder > Add	*unassigned*
Pathfinder > Exclude Overlap	unassigned
Pathfinder > Intersect	*unassigned*
Pathfinder > Minus Back	*unassigned*
Pathfinder > Subtract	*unassigned*
Reverse Path	*unassigned*
Select > Container	unassigned
Select > Content	*unassigned*
Select > First Object Above	*Default*-Opt+Shift+Cmd+]
Select > Last Object Below	*Default*-Opt+Shift+Cmd+[
Select > Next Object Above	*Default*-Opt+Cmd+]
Select > Next Object Below	*Default*-Opt+Cmd+[
Select > Next Object in Group	*unassigned*
Select > Previous Object in Group	*unassigned*
Set Tab Order	unassigned
Sound Options	*unassigned*
Text Frame Options	*Default*-Cmd+B
Transform > Move Guides	*unassigned*
Transform > Move	*Default*-Shift+Cmd+M
Transform > Rotate	*unassigned*
Transform > Scale	*unassigned*
Transform > Shear	*unassigned*
Ungroup	*Default*-Shift+Cmd+G
Unlock Position	*Default*-Opt+Cmd+L

Other

Add new index entry	*Text*-Opt+Cmd+U

Add new index entry (reversed)	*Text*-Shift+Cmd+F8
Add New Page	*Default*-Shift+Cmd+P
Add new topic	*unassigned*
Clear Local Display Settings	*Default*-Shift+Cmd+F2
Close all	Default-Opt+Shift+Cmd+W
Close Document	*Default*-Shift+Cmd+W
Create outlines without	Default-
Deleting text	Opt+Shift+Cmd+O
Lock Zero Point	*unassigned*
New Default Document	*Default*-Opt+Cmd+N
Open index entry Dialog	*Text*-Cmd+U
Save all	*Default*-Opt+Shift+Cmd+S
Unlock Zero Point	*unassigned*

Palette Menus

Book> Add Document	unassigned
Book > Automatic Document Conversion	*unassigned*
Book > Book Page Numbering Options	*unassigned*
Book > Close Book	*unassigned*
Book > Document Information	*unassigned*
Book > Document Page Numbering Options	*unassigned*
Book > Remove Document	*unassigned*
Book > Repaginate	*unassigned*
Book > Replace Document	*unassigned*
Book > Save Book	*unassigned*
Book > Save Book As	*unassigned*
Book > Synchronize Options	*unassigned*
Bookmarks > Delete Bookmark	*unassigned*
Bookmarks> Go to Selected Bookmark	unassigned
Bookmarks> New Bookmark	unassigned
Bookmarks >Rename Bookmark	unassigned
Bookmarks > Sort Bookmarks	*unassigned*
Character Styles > Delete Style	unassigned
Character Styles > Duplicate Style	unassigned
Character Styles > Load Character Styles	unassigned
Character Styles > New Character Style	*unassigned*
Character Styles > Redefine Style	Text-Opt+Shift+Cmd+C
Character Styles > Style Options	*unassigned*
Character > All Caps	*Default*-Shift+Cmd+K
Character > Ligatures	*unassigned*
Character > No Break	*unassigned*
Character > Open Type > [All Small Caps]	*unassigned*
Character > OpenType > [Contextual Alternates]	*unassigned*
Character > OpenType > [Default Figure Style]	*unassigned*
Character > OpenType > [Denominator]	*unassigned*
Character > OpenType > [Discretionary Ligatures]	*unassigned*
Character> OpenType > [Fractions]	unassigned
Character > OpenType > [Numerator]	*unassigned*
Character> OpenType > [Ordinal]	*unassigned*
Character > OpenType > [Proportional Lining]	*unassigned*
Character> Open Type > [Proportional Oldstyle]	unassigned
Character > OpenType > [Subscript/Inferior]	*unassigned*
Character> OpenType > [Superscript/Superior]	unassigned
Character > OpenType > [Swash]	*unassigned*
Character > OpenType > [Tabular Lining]	*unassigned*
Character > OpenType > Tabular Oldstyle]	*unassigned*
Character > OpenType > [Titling Alternates]	*unassigned*
Character > Show Options	*unassigned*
Character > Small Caps	Default-Shift+Cmd+H

Character > Strikethrough	*Default*-Shift+Cmd+/
Character > Strikethrough Options	*unassigned*
Character > Subscript	*Default*-Opt+Shift+Cmd+=
Character > Superscript	*Default*-Shift+Cmd+=
Character > Underline	*Default*-Shift+Cmd+U
Character > Underline Options	*unassigned*
Color > Add to Swatches	*unassigned*
Color > Show Options	*unassigned*
Control > Dock at Bottom	*unassigned*
Control > Dock at Top	*unassigned*
Control > Float	*unassigned*
Flattener Preview > Transparency Flattener Presets	*unassigned*
Glyph > Delete Glyph from Set	*unassigned*
Glyph > Edit Glyph Set	*unassigned*
Glyph > New Glyph Set	*unassigned*
Gradient > Show Options	*unassigned*
Hyperlinks > Delete Hyperlink	*unassigned*
Hyperlinks > Go To Destination	*unassigned*
Hyperlinks > Go To Source	*unassigned*
Hyperlinks > Hyperlink Destination Options	*unassigned*
Hyperlinks > Hyperlink Options	*unassigned*
Hyperlinks > New Hyperlink Destination	*unassigned*
Hyperlinks > New Hyperlink From URL	*unassigned*
Hyperlinks > New Hyperlink	*unassigned*
Hyperlinks > Reset Hyperlink	*unassigned*
Hyperlinks > Update Hyperlink	*unassigned*
Index > Capitalize	*unassigned*
Index > Delete	*unassigned*
Index > Duplicate	*unassigned*
Index > Find	*unassigned*
Index > Generate Index	*unassigned*
Index > Go to Selected Marker	*unassigned*
Index > Import Topics	*unassigned*
Index > New	*Default*-Cmd+U
Index > Options	*unassigned*
Index > Remove Unused Tovics	*unassigned*
Index > Show Unused Topics	*unassigned*
Index > Update Preview	*unassigned*
Layer > Layer Options	*unassigned*
Layer > Merge Layers	*unassigned*
Layer > New Layer	*unassigned*
Layer > Paste Remembers Layers	*unassigned*
Layer > Show All Layers	*unassigned*
Layer > Unlock All Layers	*unassigned*
Library > Add All Items on Page	*unassigned*
Library > Add Item	*unassigned*
Library > by Name	*unassigned*
Library > by Newest	*unassigned*
Library > by Oldest	*unassigned*
Library > by Type	*unassigned*
Library > Close Library	*unassigned*
Library > Delete Item(s)	*unassigned*
Library > Item Information	*unassigned*
Library > List View	*unassigned*
Library > Place Item(s)	*unassigned*
Library > Show All	*unassigned*
Library > Show Subset	*unassigned*
Library > Thumbnail View	*unassigned*
Links > Edit Original	*unassigned*
Links > Edit Original	*unassigned*
Links > Embed File	*unassigned*
Links > Go To Link	*unassigned*
Links > Link File Info	*unassigned*
Links > Link Information	*unassigned*
Links > Relink	*unassigned*
Links > Save Link Version	*unassigned*
Links > Update Link	*unassigned*
Pages > Apply Master to Pages	*unassigned*
Pages > Detach All Objects From Master	*unassigned*
Pages > Duplicate Page	*unassigned*
Pages > Insert Pages	*unassigned*
Pages > Master Options	*unassigned*
Pages > New Master	*unassigned*
Pages > Numbering & Section Options	*unassigned*

Pages > Override All Master Page Items	*Default*-Opt+Shift+Cmd+L
Pages > Remove All Local Overrides	*unassigned*
Pages > Save as Master	*unassigned*
Pages > Spread Flattening > Custom	*unassigned*
Pages > Spread Flattening > Default	*unassigned*
Pages > Spread Flattening > None (Ignore Transparency)	*unassigned*
Paragraph Styles > Delete Styles	*unassigned*
Paragraph Styles > Duplicate Style	*unassigned*
Paragraph Styles > Load Paragraph Styles	*unassigned*
Paragraph Styles > New Paragraph Style	*unassigned*
Paragraph Styles > Redefine Style	*Text*-Opt+Shift+Cmd+R
Paragraph Styles > Style Options	*unassigned*
Paragraph > Adobe Paragraph Composer	*unassigned*
Paragraph > Adobe Single-line Composer	*unassigned*
Paragraph > Balance Ragged Lines	*unassigned*
Paragraph > Drop Caps and Nested Styles	*Default*-Opt+Cmd+R
Paragraph > Hide Options	*unassigned*
Paragraph > Hyphenation	*unassigned*
Paragraph > Justification	*Default*-Opt+Shift+Cmd+J
Paragraph > Keep Options	*Default*-Opt+Cmd+K
Paragraph > Only Align First Line To Grid	*unassigned*
Paragraph > Paragraph Rules	*Default*-Opt+Cmd+J
Separations Preview > Desaturate Black	*unassigned*
Separations Preview > Show Single Plates in Black	*unassigned*
States > Delete Content from State	*unassigned*
States > Delete State	*unassigned*
States > New State	*unassigned*
States > Palette Options	*unassigned*
States > Place Content into State	*unassigned*
States > State Options	*unassigned*
Stroke > Hide Options	*unassigned*
Stroke > Stroke Styles	*unassigned*
Swatches > Add Unnamed Colors	*unassigned*
Swatches > Delete Swatch	*unassigned*
Swatches > Duplicate Swatch	*unassigned*
Swatches > Hide Options	*unassigned*
Swatches > Ink Manager	*unassigned*
Swatches > Large Swatch	*unassigned*
Swatches > Load Swatches	*unassigned*
Swatches > Merge Swatches	*unassigned*
Swatches > Name	*unassigned*
Swatches > New Color Swatch	*unassigned*
Swatches > New Gradient Swatch	*unassigned*
Swatches > New Mixed Ink Group	*unassigned*
Swatches > New Mixed Ink Swatch	*unassigned*
Swatches > New Tint Swatch	*unassigned*
Swatches > Select All Unused	*unassigned*
Swatches > Small Name	*unassigned*
Swatches > Small Swatch	*unassigned*
Swatches > Swatch Options	*unassigned*
Tab > Clear All	*unassigned*
Tab > Repeat Tab	*unassigned*
Tags > Delete Tag	*unassigned*
Tags > Load Tags	*unassigned*
Tags > New Tag	*unassigned*
Tags > Save Tags	*unassigned*
Tags > Select All Unused Tags	*unassigned*
Tags > Small Palette Rows	*unassigned*
Tags > Tag Options	*unassigned*
Tags > Untag Frame	*unassigned*
Transform > Flip Both	*unassigned*
Transform > Flip Horizontal	*unassigned*
Transform > Flip Vertical	*unassigned*
Transform > Reset Scaling to 100%	*unassigned*
Transform > Rotate 180°	*unassigned*

Transform > Rotate 90° CCW	*unassigned*
Transform > Rotate 90° CW	*unassigned*
Transform > Scale Text Attributes	*unassigned*
Transform > Transform Content	*unassigned*
Transform > Transform Group Content	*unassigned*
Transparency > Show Options	*unassigned*
Trap Presets > Assign Trap Preset	*unassigned*
Trap Presets > Delete Presets	*unassigned*
Trap Presets > Duplicate Preset	*unassigned*
Trap Presets > Load Trap Presets	*unassigned*
Trap Presets > New Preset	*unassigned*
Trap Presets > Preset Options	*unassigned*
Trap Presets > Select All Unused	*unassigned*

Structure Menu

Add Untagged Items	*unassigned*
Delete	*unassigned*
Delete DTD	*unassigned*
DTD Options	*unassigned*
Edit	*unassigned*
Go to Item	*unassigned*
Import DTD	*unassigned*
Map Styles to Tags	*unassigned*
Map Tags to Styles	*unassigned*
New Attribute	*unassigned*
New Comment	*unassigned*
New Element	*unassigned*
New Processing Instruction	*unassigned*
Select in Structure	*unassigned*
Show Attributes	*unassigned*
Show Comments	*unassigned*
Show Processing Instructions	*unassigned*
Show Text Snippets	*unassigned*
Tag Element	*unassigned*
Validate from Root Element	*unassigned*
View DTD	*unassigned*

Structure Navigation

Collapse element	XML-Left Arrow
Collapse element and child elements	*XML*-Opt+Left Arrow
Expand element	*XML*-Right Arrow
Expand element and child elements	*XML*-Opt+Right Arrow
Extend XML selection Down	*XML*-Shift+Down Arrow
Extend XML selection up	*XML*-Shift+Up Arrow
Move XML selection Down	*XML*-Down Arrow
Move XML selection up	*XML*-Up Arrow
Scroll structure pane Down one screen	*XML*-Page Down
Scroll structure pane up one screen	XML-Page Up
Select first XML node	XML-Home
Select last XML node	*XML*-End
Select through first XML node	*XML*-Shift+Home
Select through last XML node	*XML*-Shift+End
View next validation error	*XML*-Cmd+Right Arrow
View previous validation error	*XML*-Cmd+Left Arrow

Tables Menu

Cell Options > Diagonal Lines	*unassigned*
Cell Options > Rows and Columns	*unassigned*
Cell Options > Strokes and Fills	*unassigned*
Cell Options > Text	*Tables*-Opt+Cmd+B
Convert Table to Text	*unassigned*
Convert Text to Table	*unassigned*
Convert to Body Rows	*unassigned*
Convert to Footer Rows	*unassigned*
Convert to Header Rows	*unassigned*
Delete > Column	*Tables*-Shift+Delete
Delete > Row	*Tables*-Cmd+Delete
Delete > Table	*unassigned*
Distribute Columns Evenly	*unassigned*
Distribute Rows Evenly	*unassigned*
Edit Footer	*unassigned*
Edit Header	*unassigned*
Go to Row	*unassigned*

Insert Table	*Text*-Opt+Shift+Cmd+T
Insert > Column	*Tables*-Opt+Cmd+9
Insert > Row	*Tables*-Cmd+9
Merge Cells	*unassigned*
Select > Body Rows	*unassigned*
Select > Cell	*Tables*-Cmd+/
Select > Column	*Tables*-Opt+Cmd+3
Select > Footer Rows	*unassigned*
Select > Header Rows	*unassigned*
Select > Row	*Tables*-Cmd+3
Select > Table	*Tables*-Opt+Cmd+A
Split Cell Horizontally	*unassigned*
Split Cell Vertically	*unassigned*
Table Options > Alternating Column Strokes	*unassigned*
Table Options > Alternating Fills	*unassigned*
Table Options > Alternating Row Strokes	*unassigned*
Table Options > Headers and Footers	*unassigned*
Table Options > Table Setup	*Default*-Opt+Shift+Cmd+B
To Body	*unassigned*
To Footer	*unassigned*
To Header	*unassigned*
Unmerge Cells	*unassigned*

Text and Tables

0°	unassigned
180°	*unassigned*
270°	*unassigned*
90°	*unassigned*
Align center	*Default*-Shift+Cmd+C
Align force justify	*Default*-Shift+Cmd+F
Align justify	*Default*-Shift+Cmd+J
Align left	*Default*-Shift+Cmd+L
Align right	*Default*-Shift+Cmd+R
Align to baseline grid	Default-Opt+Shift+Cmd+G
Apply bold	*Default*-Shift+Cmd+B
Apply italic	*Default*-Shift+Cmd+I
Apply normal	*Default*-Shift+Cmd+Y
Auto leading	*Default*-Opt+Shift+Cmd+A
Auto-hyphenate on/off	*Default*-Opt+Shift+Cmd+H
Clear	*Tables*-Delete
Decrease baseline shift	*Text*-Opt+Shift+Down Arrow
Decrease baseline shift x 5	Text-Opt+Shift+Cmd+Down Arrow
Decrease kerning/tracking	*Text*-Opt+Left Arrow
Decrease kerning/tracking x 5	*Text*-Opt+Cmd+Left Arrow
Decrease leading	*Text*-Opt+Up Arrow
Decrease leading x 5	*Text*-Opt+Cmd+Up Arrow
Decrease point size	*Default*-Shift+Cmd+,
Decrease point size x 5	*Default*-Opt+Shift+Cmd+,
Decrease word space	*Default*-Opt+Cmd+Delete
Decrease word space x 5	*Default*-Opt+Shift+Cmd+Delete
Delete	*Tables*-Del
Find Next	*Text*-Shift+F2
Increase baseline shift	*Text*-Opt+Shift+Up Arrow
Increase baseline shift x 5	*Text*-Opt+Shift+Cmd+Up Arrow
Increase kerning/tracking	*Text*-Opt+Right Arrow
Increase kerning/tracking x 5	*Text*-Opt+Cmd+Right Arrow
Increase leading	*Text*-Opt+Down Arrow
Increase leading x 5	*Text*-Opt+Cmd+Down Arrow
Increase point size	*Default*-Shift+Cmd+.
Increase point size x 5	*Default*-Opt+Shift+Cmd+.
Increase word space	*Default*-Opt+Cmd+\

Increase word space x 5	Default-Opt+Shift+Cmd+\
Insert Column	unassigned
Insert Row	unassigned
Keep with Next Row	unassigned
Load Find and Find Next instance	Text-Shift+F1
Load Find with selected text	Text-Cmd+F1
Load Replace with selected text	Text-Cmd+F2
Move Down	Tables-Down Arrow
Move Down one line	Text-Down Arrow
Move Left	Tables-Left Arrow
Move Right	Tables-Right Arrow
Move to beginning of story	Text-Cmd+Home
Move to end of story	Text-Cmd+End
Move to First Cell in Column	Tables-Opt+Page Up
Move to First Cell in Row	Tables-Opt+Home
Move to First Row in Frame	Tables-Page Up
Move to Last Cell in Column	Tables-Opt+Page Down
Move to Last Cell in Row	Tables-Opt+End
Move to Last Row in Frame	Tables-Page Down
Move to Next Cell	Tables-Tab
Move to Previous Cell	Tables-Shift+Tab
Move to the end of the line	Text-End
Move to the left one character	Text-Left Arrow
Move to the left one word	Text-Cmd+Left Arrow
Move to the next paragraph	Text-Cmd+Down Arrow
Move to the previous paragraph	Text-Cmd+Up Arrow
Move to the right one character	Text-Right Arrow
Move to the right one word	Text-Cmd+Right Arrow
Move to the start of the line	Text-Home
Move Up	Tables-Up Arrow
Move up one line	Text-Up Arrow
Normal horizontal text scale	Default-Shift+Cmd+X
Normal vertical text scale	Default-Opt+Shift+Cmd+X
Recompose all stories	Default-Opt+Cmd+/
Recompose all stories immediatelv	unassigned
Replace with Change To text	Text-Cmd+F3
Replace with Change To text and Find Next	Text-Shift+F3
Reset kerning and tracking	Text-Opt+Cmd+Q
Select Cells Above	Tables-Shift+Up Arrow
Select Cells Below	Tables-Shift+Down Arrow
Select Cells to the Left	Tables-Shift+Left Arrow
Select Cells to the Right	Tables-Shift+Right Arrow
Select line	Text-Shift+Cmd+\
Select one character to the left	Text-Shift+Left Arrow
Select one character to the right	Text-Shift+Right Arrow
Select one line above	Text-Shift+Up Arrow
Select one line below	Text-Shift+Down Arrow
Select one paragraph before	Text-Shift+Cmd+Up Arrow
Select one paragraph forward	Text-Shift+Cmd+Down Arrow
Select one word to the left	Text-Shift+Cmd+Left Arrow
Select one word to the right	Text-Shift+Cmd+Right Arrow
Select to beginning of story	Tart-Shift+Cmd+Home
Select to end of story	Text-Shift+Cmd+End
Select to the end of the line	Text-Shift+End
Select to the start of the line	Text-Shift+Home
Start Row on Next Column	Tables-Enter
Start Row on Next Frame	Tables-Shift+Enter
Switch composer	unassigned
Toggle Autogrow	unassigned
Toggle Cell/Text Selection	Tables-Escape
Toggle Typographer's Quotes preference	Default-Opt+Shift+Cmd+'
Update missing font list	Default-Opt+Shift+Cmd+/

Tools

Add Anchor Point Tool	Default-=
Apply color	*Default*-,
Apply Default fill and stroke colors	*Default*-D
Apply gradient	*Default*-.
Apply None	*Default*-/, *Default*-Num /
Button Tool	*Default*-B
Convert Direction Point Tool	*Default*-Shift+C
Delete Anchor Point Tool	*Default*--
Direct Selection Tool	*Default*-A
Ellipse Frame Tool	*unassigned*
Ellipse Tool	*Default*-L
Erase Tool	*unassigned*
Eyedropper Tool	*Default*-I
Free Transform Tool	*Default*-E
Gradient Tool	*Default*-G
Hand Tool	*Default*-H
Line Tool	*Default*-\
Measure Tool	*Default*-K
Pen Tool	*Default*-P
Pencil Tool	*Default*-N
Polygon Frame Tool	*unassigned*
Polygon Tool	*unassigned*
Rectangle Frame Tool	*Default*-F
Rectangle Tool	*Default*-M
Rotate Tool	*Default*-R
Scale Tool	Default-S
Scissors Tool	*Default*-C
Selection Tool	*Default*-V
Shear Tool	*Default*-O
Smooth Tool	*unassigned*
Swap fill and stroke activation	*Default*-X
Swap fill and stroke colors	*Default*-Shift+X
Toggle Text and Object Control	*Default*-J
Toggle view setting between Default and preview	Default-W
Type on a Path Tool	*Default*-Shift+T
Type Tool	*Default*-T
Zoom Tool	*Default*-Z

Type Menu

Change Case > lowercase	unassigned
Change Case > Sentence case	unassigned
Change Case > Title Case	*unassigned*
Change Case > UPPERCASE	*unassigned*
Character Styles	*Default*-Shift+F11
Character	*Default*-Cmd+T
Create Outlines	*Default*-Shift+Cmd+O
Fill with Placeholder Text	*unassigned*
Find Font	*unassigned*
Glyphs	unassigned
Hide Hidden Characters	*Default*-Opt+Cmd+I
Insert Break Character > Column Break	Text-Enter
Insert Break Character > Even Page Break	*unassigned*
Insert Break Character > Forced Line Break	Text-Shift+Return
Insert Break Character > Frame Break	Text-Shift+Enter
Insert Break Character > Odd Page Break	*unassigned*
Insert Break Character > Page Break	Text-Cmd+Enter
Insert Break Character > Paragraph Return	*unassigned*
Insert Special Character > Auto Page Number	Text-Opt+Shift+Cmd+N
Insert Special Character > Bullet Character	*unassigned*
Insert Special Character > Copyright Symbol	*unassigned*
Insert Special Character > Discretionary Hyphen	Text-Shift+Cmd+-
Insert Special Character > Double Left Quotation Mark	*unassigned*
Insert Special Character > Double Right Quotation Mark	unassigned
Insert Special Character > Ellipsis	*unassigned*
Insert Special Character > Em Dash	unassigned
Insert Special Character > En Dash	*unassigned*

Insert Special Character > End Nested Style Here	unassigned
Insert Special Character > Indent to Here	*Text*-Cmd+\
Insert Special Character > Next Page Number	*Text*-Opt+Shift+Cmd+]
Insert Special Character > Nonbreaking Hyphen	*Text*-Opt+Cmd+-
Insert Special Character > Paragraph Symbol	unassigned
Insert Special Character > Previous Page Number	*Text*-Opt+Shift+Cmd+[
Insert Special Character > Punctuation Space	*unassigned*
Insert Special Character > Registered Trademark Symbol	*unassigned*
Insert Special Character > Right Indent Tab	*Text*-Shift+Tab
Insert Special Character > Section Marker	unassigned
Insert Special Character > Section Symbol	unassigned
Insert Special Character > Single Left Quotation Mark	unassigned
Insert Special Character > Single Right Quotation Mark	unassigned
Insert Special Character > Tab	*unassigned*
Insert Special Character > Trademark Symbol	unassigned
Insert White Space > Em Space	*Text*-Shift+Cmd+M
Insert White Space > En Space	*Text*-Shift+Cmd+N
Insert White Space > Figure Space	*unassigned*
Insert White Space > Flush Space	*unassigned*
Insert White Space > Hair Space	*Text*-Opt+Shift+Cmd+I
Insert White Space > Nonbreaking Space	*Text*-Opt+Cmd+X
Insert White Space > Thin Space	*Text*-Opt+Shift+Cmd+M
Paragraph Styles	*Default*-F11
Paragraph	*Default*-Opt+Cmd+T
Size > Other > Other	*unassigned*
Story	*unassigned*
Tabs	*Default*-Shift+Cmd+T
Type on Path > Delete Type from Path	*unassigned*
Type on Path > Options	*unassigned*

View Menu

Actual Size	*Default*-Cmd+1
Allow Object-Level Display Settings	*unassigned*
Entire Pasteboard	*Default*-Opt+Shift+Cmd+0
Fit Page in Window	*Default*-Cmd+0
Fit Spread in Window	*Default*-Opt+Cmd+0
Hide Frame Edges	*Default*-Cmd+H
Hide Guides	*Default*-Cmd+;
Hide Hyperlinks	*unassigned*
Hide Master Items	*unassigned*
Hide Rulers	*Default*-Cmd+R
Hide Style Name Column	*unassigned*
High Quality Display	Default-Opt+Cmd+H
Ink Manager	*unassigned*
Lock Guides	*Default*-Opt+Cmd+;
Optimized Display	*Default*-Opt+Cmd+O
Overprint Preview	*Default*-Opt+Shift+Cmd+Y
Proof Colors	*unassigned*
Proof Setup > Custom	*unassigned*
Proof Setup > Document CMYK	*unassigned*
Proof Setup > Working CMYK	*unassigned*
Show Baseline Grid	*Default*-Opt+Cmd+'
Show Document Grid	*Default*-Cmd+'
Show Structure	*Default*-Opt+Cmd+1
Show Tag Markers	*unassigned*
Show Tagged Frames	*unassigned*
Show Text Threads	*Default*-Opt+Cmd+Y

Snap to Document Grid	*Default*-Shift+Cmd+'
Snap to Guides	*Default*-Shift+Cmd+;
Typical Display	*Default*-Opt+Cmd+Z
Zoom In	*Default*-Cmd+=, *Default*-Cmd+Num +
Zoom Out	*Default*-Cmd+-, *Default*-Cmd+Num -

Views, Navigation

200% size	*Default*-Cmd+2
400% size	*Default*-Cmd+4
50% size	*Default*-Cmd+5
Access page number box	*Default*-Cmd+J
Access zoom percentage box	*Default*-Opt+Cmd+5
Activate last-used field in palette	*Default*-Opt+Cmd+'
First Spread	*Default*-Home, *Default*-Opt+Shift+Page Up
Fit Selection in Window	*Default*-Opt+Cmd+=
Force redraw	*Default*-Shift+F5
Go to first frame	Default-Opt+Shift+Cmd+Page Up
Go to last frame	*Default*-Opt+Shift+Cmd+Page Down
Go to next frame	Default-Opt+Cmd+Page Down
Go to previous frame	*Default*-Opt+Cmd+Page Up
Grids in Back	*unassigned*
Guides in Back	*unassigned*
Horizontal Ruler > Centimeters	*unassigned*
Horizontal Ruler > Ciceros	*unassigned*
Horizontal Ruler > Custom	*unassigned*
Horizontal Ruler > Inches	*unassigned*
Horizontal Ruler > Inches Decimal	unassigned
Horizontal Ruler > Millimeters	*unassigned*
Horizontal Ruler > Picas	*unassigned*
Horizontal Ruler > Points	*unassigned*
Last Spread	*Default*-End, Default-Opt+Shift+Page Down
Next window	*Default*-Cmd+F6
Open/Close all palettes in side tabs	Default-Opt+Cmd+Tab
Open/Close palettes in left side tabs	*unassigned*
Open/Close palettes in right side tabs	unassigned
Previous window	*Default*-Shift+Cmd+F6
Ruler On Spine	*unassigned*
Ruler Per Page	*unassigned*
Ruler Per Spread	*unassigned*
Scroll Down one screen	*Default*-Page Down, *Text*-Page Down
Scroll up one screen	Default-Page Up, *Text*-Page Up
Show 1st spot plate	*Default*-Opt+Shift+Cmd+5
Show 2nd spot plate	*Default*-Opt+Shift+Cmd+6
Show 3rd spot plate	*Default*-Opt+Shift+Cmd+7
Show 4th spot plate	*Default*-Opt+Shift+Cmd+8
Show 5th spot plate	*Default*-Opt+Shift+Cmd+9
Show all plates	*Default*-Opt+Shift+Cmd+'
Show Black plate	*Default*-Opt+Shift+Cmd+4
Show Cyan plate	*Default*-Opt+Shift+Cmd+1
Show Magenta plate	*Default*-Opt+Shift+Cmd+2
Show Yellow plate	*Default*-Opt+Shift+Cmd+3
Show/Hide all palettes	*Default*-Tab
Suppress overrides (view optimized)	*Default*-Cmd+.
Toggle all palettes except toolbox	*Default*-Shift+Tab
Toggle between current and previous views	*Default*-Opt+Cmd+2
Toggle Character and Paragraph Modes in Control Panel	*Default*-Opt+Cmd+7
Toggle Keyboard Focus in Control Palette	*Default*-Cmd+6
Toggle Measurement System	*Default*-Opt+Shift+Cmd+U

Vertical	*unassigned*
Ruler > Centimeters	
Vertical Ruler > Ciceros	*unassigned*
Vertical Ruler > Custom	*unassigned*
Vertical Ruler > Inches	*unassigned*
Vertical Ruler > Inches Decimal	*unassigned*
Vertical Ruler > Millimeters	*unassigned*
Vertical Ruler > Picas	*unassigned*
Vertical Ruler > Points	*unassigned*

Window Menu

Align	*Default*-Shift+F7
Attributes	*unassigned*
Bookmarks	*unassigned*
Bring All To Front	*unassigned*
Cascade	*unassigned*
Clear Local Display Settings	*unassigned*
Color	*Default*-F6
Control	*Default*-Opt+Cmd+6
Delete Workspace	*unassigned*
Flattener	*unassigned*
Gradient	*unassigned*
Hyperlinks	*unassigned*
Index	*Default*-Shift+F8
Info	*Default*-F8
Layers	*Default*-F7
Links	*Default*-Shift+Cmd+D
Load 1st Workspace	*unassigned*
Load 2nd Workspace	*unassigned*
Load 3rd Workspace	*unassigned*
Load 4th Workspace	*unassigned*
Load 5th Workspace	*unassigned*
Minimize	*Default*-Cmd+M
Navigator	*unassigned*
New Window	*unassigned*
Pages	*Default*-F12
Pathfinder	*unassigned*
Save Workspace	*unassigned*
Script Label	*unassigned*
Scripts	*unassigned*
Separations	*Default*-Shift+F6
States	*unassigned*
Stroke	*Default*-F10
Swatches	*Default*-F5
Table	*Default*-Shift+F9
Tags	*unassigned*
Text Wrap	*Default*-Opt+Cmd+W
Tile	*unassigned*
Tools	*unassigned*
Transform	*Default*-F9
Transparency	*Default*-Shift+F10
Trap Presets	*unassigned*

Windows Shortcuts

The following are the keyboard shortcuts for Windows.

Edit Menu

Assign Profiles	*unassigned*
Check Spelling	*Default*-Ctrl+I
Clear	*Default*-Backspace, *Default*-Ctrl+Backspace, *Default*-Delete, *Default*-Ctrl+Delete
Color Settings	*unassigned*
Convert to Profile	*unassigned*
Copy	*Default*-Ctrl+C
Cut	*Default*-Ctrl+X
Deselect All	*Default*-Shift+Ctrl+A
Dictionary	*unassigned*
Duplicate	*Default*-Shift+Ctrl+Alt+D
Edit in Story Editor	*Default*-Ctrl+Y
Find Next	*Default*-Ctrl+Alt+F
Find/Change	*Default*-Ctrl+F
Keyboard Shortcuts	*unassigned*
Paste	*Default*-Ctrl+V
Paste in Place	*Default*-Shift+Ctrl+Alt+V
Paste Into	*Default*-Ctrl+Alt+V
Preferences > Composition	*unassigned*
Preferences > Dictionary	*unassigned*
Preferences > Display Performance	*unassigned*
Preferences > File Handling	*unassigned*
Preferences > General	*Default*-Ctrl+K
Preferences > Grids	*unassigned*
Preferences > Guides & Pasteboard	*unassigned*
Preferences > Spelling	*unassigned*
Preferences > Story Editor Display	*unassigned*
Preferences > Text	*unassigned*
Preferences > Units & Increments	*unassigned*
Preferences > Updates	*unassigned*
Redo	*Default*-Shift+Ctrl+Z
Select All	*Default*-Ctrl+A

Step and Repeat	*Default*-Shift+Ctrl+V
Transparency Blend Space > Document CMYK	*unassigned*
Transparency Blend Space > Document RGB	unassigned
Transparency Flattener Presets	*unassigned*
Undo	*Default*-Ctrl+Z

File Menu

Close	*Default*-Ctrl+W, *Default*-Ctrl+F4
Document Presets > Define	*unassigned*
Document Setup	*Default*-Ctrl+Alt+P
Exit	*Default*-Ctrl+Q
Export	*Default*-Ctrl+E
File Info	*unassigned*
Import XML	*unassigned*
Library	*unassigned*
New > Book	*unassigned*
New > Document	*Default*-Ctrl+N
Open	*Default*-Ctrl+O
Package for GoLive	*unassigned*
PDF Export Presets > Define	*unassigned*
Place	*Default*-Ctrl+D
Preflight	*Default*-Shift+Ctrl+Alt+F
Print Presets > Define	*unassigned*
Print	*Default*-Ctrl+P
Revert	*unassigned*
Save	*Default*-Ctrl+S
Save a Copy	*Default*-Ctrl+Alt+S
Save a Version	*unassigned*
Save As	*Default*-Shift+Ctrl+S
Versions	*unassigned*

Help Menu

About InDesign	*unassigned*
Configure Plug-ins	*unassigned*
InDesign Help	*Default*-F1
InDesign Online	*unassigned*
Online Support	*unassigned*
Registration	*unassigned*
Report a bug	*unassigned*
Updates	unassigned

Japanese Typography

Delete Glyph Set	*unassigned*
Horizontal	*unassigned*
New Glyph Set	*unassigned*
Vertical	*unassigned*

Layout Menu

Create Guides	*unassigned*
First Page	*Default*-Shift+Ctrl+Page Up
Go Back	*Default*-Ctrl+Page Up
Go Forward	*Default*-Ctrl+Page Down
Last Page	*Default*-Shift+Ctrl+Page Down
Layout Adjustment	*unassigned*
Margins and Columns	*unassigned*
Next Page	*Default*-Shift+Page Down, *Text*-Shift+Page Down
Next Spread	*Default*-Alt+Page Down
Numbering & Section Options	unassigned
Previous Page	*Default*-Shift+Page Up, *Text*-Shift+Page Up
Previous Spread	*Default*-Alt+Page Up
Ruler Guides	*unassigned*
Table of Contents Styles	*unassigned*
Table of Contents	unassigned
Update Table of Contents	*unassigned*
Update table of contents using current style	*unassigned*

Object Editing

Convert Clipping Path to Frame	*unassigned*
Decrease size/scale by 1%	*Default*-Ctrl+,
Decrease size/scale by 5%	*Default*-Ctrl+Alt+,
Horizontal Align Center	*unassigned*
Horizontal Align Left	*unassigned*
Horizontal Align Right	*unassigned*
Horizontal Distribute Center	*unassigned*
Horizontal Distribute Left	*unassigned*
Horizontal Distribute Right	unassigned
Horizontal Distribute Space	unassigned
Increase size/scale by 1%	unassigned

Increase size/scale by 5%	*Default*-Ctrl+Alt+.
Nudge down	*Default*-Down Arrow
Nudge down 1/10	*Default*-Shift+Ctrl+Down Arrow
Nudge down 1/10 duplicate	*Default*-Shif t+Ctrl+Alt+Down Arrow
Nudge down duplicate	*Default*-Alt+Down Arrow
Nudge down x10	*Default*-Shift+Down Arrow
Nudge down x10 duplicate	*Default*-Shift+Alt+Down Arrow
Nudge left	Default-Left Arrow
Nudge left 1/10	*Default*-Shift+Ctrl+Left Arrow
Nudge left 1/10 duplicate	*Default*-Shift+Ctrl+Alt+Left Arrow
Nudge left duplicate	*Default*-Alt+Left Arrow
Nudge left x10	*Default*-Shift+Left Arrow
Nudge left x10 duplicate	Default-Shift+Alt+Left Arrow
Nudge right	Default-Right Arrow
Nudge right 1/10	*Default*-Shift+Ctrl+Right Arrow
Nudge right 1/10 duplicate	*Default*-Shif t+Ctrl+Alt+Right Arrow
Nudge right duplicate	*Default*-Alt+Right Arrow
Nudge right x10	*Default*-Shift+Right Arrow
Nudge right x10 duplicate	Default-Shift+Alt+Right Arrow
Nudge up	Default-Up Arrow
Nudge up 1/10	*Default*-Shift+Ctrl+Up Arrow
Nudge up 1/10 duplicate	*Default*-Shift+Ctrl+Alt+Up Arrow
Nudge up duplicate	*Default*-Alt+Up Arrow
Nudge up x10	*Default*-Shift+Up Arrow
Nudge up x10 duplicate	Default-Shift+Alt+Up Arrow
Select all guides	*Default*-Ctrl+Alt+G
Vertical Align Bottom	*unassigned*
Vertical Align Center	*unassigned*
Vertical Align Top	*unassigned*
Vertical Distribute Bottom	*unassigned*
Vertical Distribute Center	*unassigned*
Vertical Distribute Space	*unassigned*
Vertical Distribute Top	unassigned

Object Menu

Arrange > Bring Forward	*Default*-Ctrl+]
Arrange > Bring to Front	*Default*-Shift+Ctrl+]
Arrange > Send Backward	*Default*-Ctrl+[
Arrange > Send to Back	*Default*-Shift+Ctrl+[
Button Options	*unassigned*
Clipping Path	*Default*-Shift+Ctrl+Alt+K
Compound > Make	*Default*-Ctrl+8
Compound > Release	*unassigned*
Content > Graphic	*unassigned*
Content > Text	*unassigned*
Content > Unassigned	*unassigned*
Convert to Button	*unassigned*
Corner Effects	*unassigned*
Display > Use View Setting	*unassigned*
Drop Shadow	*Default*-Ctrl+Alt+M
Feather	*unassigned*
Fitting > Center Content	*Default*-Shift+Ctrl+E
Fitting> Fit Content Proportionally	*Default*-Shift+Ctrl+Alt+E
Fitting > Fit Content to Frame	*Default*-Ctrl+Alt+E
Fitting > Fit Frame to Content	*Default*-Ctrl+Alt+C
Group	*Default*-Ctrl+G
Image Color Settings	*unassigned*
Lock Position	*Default*-Ctrl+L
Movie Options	*unassigned*
Pathfinder > Add	*unassigned*
Pathfinder > Exclude Overlap	*unassigned*
Pathfinder > Intersect	*unassigned*
Pathfinder > Minus Back	*unassigned*

Pathfinder>Subtract	unassigned
Reverse Path	*unassigned*
Select>Container	*unassigned*
Select>Content	*unassigned*
Select>First Object Above	*Default*-Shift+Ctrl+Alt+]
Select>Last Object Below	Default-Shift+Ctrl+Alt+[
Select>Next Object Above	*Default*-Ctrl+Alt+]
Select>Next Object Below	*Default*-Ctrl+Alt+[
Select>Next Object in Group	*unassigned*
Select>Previous Object in Group	*unassigned*
Set Tab Order	*unassigned*
Sound Options	*unassigned*
Text Frame Options	*Default*-Ctrl+B
Transform>Move Guides	*unassigned*
Transform>Move	*Default*-Shift+Ctrl+M
Transform>Rotate	*unassigned*
Transform>Scale	*unassigned*
Transform>Shear	*unassigned*
Ungroup	*Default*-Shift+Ctrl+G
Unlock Position	*Default*-Ctrl+Alt+L

Other

Add new index entry	*Text*-Ctrl+Alt+U
Add new index entry (reversed)	*Text*-Shift+Ctrl+F8
Add New Page	*Default*-Shift+Ctrl+P
Add new topic	*unassigned*
Clear Local Display Settings	*Default*-Shift+Ctrl+F2
Close all	*Default*-Shift+Ctrl+Alt+W
Close document	*Default*-Shift+Ctrl+W
Create outlines without deleting text	Default-Shift+Ctrl+Alt+O
Lock Zero Point	*unassigned*
New default document	*Default*-Ctrl+Alt+N
Open index entry dialog	*Text*-Ctrl+U
Save all	*Default*-Shift+Ctrl+Alt+S
Unlock Zero Point	*unassigned*

Palette Menus

Book>Add Document	unassigned
Book>Automatic Document Conversion	unassigned
Book>Book Page Numbering Options	*unassigned*
Book>Close Book	*unassigned*
Book>Document Information	*unassigned*
Book>Document Page Numbering Options	*unassigned*
Book>Remove Document	*unassigned*
Book>Repaginate	*unassigned*
Book>Replace Document	*unassigned*
Book>Save Book	*unassigned*
Book>Save Book As	*unassigned*
Book>Synchronize Options	*unassigned*
Bookmarks>Delete Bookmark	*unassigned*
Bookmarks>Go to Selected Bookmark	unassigned
Bookmarks>New Bookmark	*unassigned*
Bookmarks>Rename Bookmark	*unassigned*
Bookmarks>Sort Bookmarks	*unassigned*
Character Styles>Delete Style	*unassigned*
Character Styles>Duplicate Style	*unassigned*
Character Styles>Load Character Styles	*unassigned*
Character Styles>New Character Style	*unassigned*
Character Styles>Redefine Style	*Text*-Shift+Ctrl+Alt+C
Character Styles>Style Options	*unassigned*
Character>All Caps	*Default*-Shift+Ctrl+K
Character>Ligatures	*unassigned*
Character>No Break	*unassigned*
Character>OpenType>All Small Caps	*unassigned*
Character>OpenType>Contextual Alternates	*unassigned*
Character>OpenType>Default Figure Style	*unassigned*

Character > OpenType > Denominator	*unassigned*
Character > OpenType > Discretionary Ligatures	*unassigned*
Character > OpenType > Fractions	*unassigned*
Character > OpenType > Numerator	*unassigned*
Character > OpenType > Ordinal	*unassigned*
Character > OpenType > Proportional Lining	*unassigned*
Character > OpenType > Proportional Oldstyle	*unassigned*
Character > OpenType > Subscript/Inferior	*unassigned*
Character > OpenType > Superscript/Superior	*unassigned*
Character > OpenType > Swash	*unassigned*
Character > OpenType > Tabular Lining	*unassigned*
Character > OpenType > Tabular Oldstyle	*unassigned*
Character > OpenType > Titling Alternates	*unassigned*
Character > Show Options	*unassigned*
Character > Small Caps	*Default*-Shift+Ctrl+H
Character > Strikethrough	*Default*-Shift+Ctrl+/
Character > Strikethrough Options	*unassigned*
Character > Subscript	*Default*-Shift+Ctrl+Alt+=
Character > Superscript	*Default*-Shift+Ctrl+=
Character > Underline	*Default*-Shift+Ctrl+U
Character > Underline Options.	*unassigned*
Color > Add to Swatches	*unassigned*
Color > Show Options	*unassigned*
Control > Dock at Bottom	*unassigned*
Control > Dock at Top	*unassigned*
Control > Float	*unassigned*
Flattener Preview > Transparency Flattener Presets	*unassigned*
Glyph > Delete Glyph from Set	*unassigned*
Glyph > Edit Glyph Set	*unassigned*
Glyph > New Glyph Set	*unassigned*
Gradient > Show Options	*unassigned*
Hyperlinks > Delete Hyperlink	*unassigned*
Hyperlinks > Go To Destination	*unassigned*
Hyperlinks > Go To Source	*unassigned*
Hyperlinks > Hyperlink Destination Options	*unassigned*
Hyperlinks > Hyperlink Options	*unassigned*
Hyperlinks > New Hyperlink Destination	*unassigned*
Hyperlinks > New Hyperlink From URL	*unassigned*
Hyperlinks > New Hyperlink	*unassigned*
Hyperlinks > Reset Hyperlink	*unassigned*
Hyperlinks > Update Hyperlink	*unassigned*
Index > Capitalize	*unassigned*
Index > Delete	*unassigned*
Index > Duplicate	*unassigned*
Index > Find	*unassigned*
Index > Generate Index	*unassigned*
Index > Go to Selected Marker	*unassigned*
Index > Import Topics	*unassigned*
Index > New	*Default*-Ctrl+U
Index > Options	*unassigned*
Index > Remove Unused Topics	*unassigned*
Index > Show Unused Topics	*unassigned*
Index > Update Preview	*unassigned*
Layer > Layer Options	*unassigned*
Layer > Merge Layers	*unassigned*
Layer > New Layer	*unassigned*
Layer > Paste Remembers Layers	*unassigned*
Layer > Show All Layers	*unassigned*
Layer > Unlock All Layers	*unassigned*
Library > Add All Items on Page	*unassigned*
Library > Add Item	*unassigned*
Library > by Name	*unassigned*
Library > by Newest	*unassigned*
Library > by Oldest	*unassigned*
Library > by Type	*unassigned*
Library > Close Library	*unassigned*

Library > Delete Item(s)	*unassigned*
Library > Item Information	*unassigned*
Library > List View	*unassigned*
Library > Place Item(s)	*unassigned*
Library > Show All	*unassigned*
Library > Show Subset	*unassigned*
Library > Thumbnail View	*unassigned*
Links > Edit Original	*unassigned*
Links > Edit Original	*unassigned*
Links > Embed File	*unassigned*
Links > Go To Link	*unassigned*
Links > Link File Info	*unassigned*
Links > Link Information	*unassigned*
Links > Relink	*unassigned*
Links > Save Link Version	*unassigned*
Links > Update Link	*unassigned*
Pages > Apply Master to Pages	*unassigned*
Pages > Detach All Objects From Master	*unassigned*
Pages > Duplicate	*unassigned*
Pages > Insert Pages	*unassigned*
Pages > Master Options	*unassigned*
Pages > New Master	*unassigned*
Pages > Numbering & Section Options	*unassigned*
Pages > Override All Master Page Items	*Default*-Shift+Ctrl+Alt+L
Pages > Remove All Local Overrides	unassigned
Pages > Save as Master	*unassigned*
Pages > Spread	unassigned
Flattening > Custom Pages > Spread	*unassigned*
Flattening > Default Pages > Spread	*unassigned*
Flattening > None (Ignore Transparency)	*unassigned*
Paragraph Styles > Delete Styles	*unassigned*
Paragraph	unassigned
Styles > Duplicate Style	
Paragraph Styles > Load Paragraph Styles	*unassigned*
Paragraph Styles > New Paragraph Style	unassigned
Paragraph Styles > Redefine Style	*Text*-Shift+Ctrl+Alt+R
Paragraph Styles > Style Options	unassigned
Paragraph > Adobe Paragraph Composer	*unassigned*
Paragraph > Adobe Single-line Composer	*unassigned*
Paragraph > Balance Ragged Lines	*unassigned*
Paragraph > Drop Caps and Nested Styles	*Default*-Ctrl+Alt+R
Paragraph > Hyphenation	*unassigned*
Paragraph > Justification	*Default*-Shift+Ctrl+Alt+J
Paragraph > Keep Options	*Default*-Ctrl+Alt+K
Paragraph > Only Align First Line To Grid	unassigned
Paragraph > Paragraph Rules	*Default*-Ctrl+Alt+J
Paragraph > Show Options	*unassigned*
Separations Preview > Desaturate Black	*unassigned*
Separations Preview > Show Single Plates in Black	*unassigned*
States > Delete Content from State	*unassigned*
States > Delete State	*unassigned*
States > New State	*unassigned*
States > Palette Options	*unassigned*
States > Place Content into State	*unassigned*
States > State Options	*unassigned*
Stroke > Show Options	*unassigned*
Stroke > Stroke Styles	*unassigned*
Swatches > Add Unnamed Colors	*unassigned*
Swatches > Delete Swatch	*unassigned*
Swatches > Duplicate Swatch	*unassigned*
Swatches > Hide Options	*unassigned*
Swatches > Ink Manager	*unassigned*
Swatches > Large Swatch	*unassigned*
Swatches > Load Swatches	*unassigned*
Swatches > Merge Swatches	unassigned
Swatches > Name	unassigned
Swatches > New Color Swatch	*unassigned*
Swatches > New Gradient Swatch	*unassigned*
Swatches > New Mixed Ink Group	*unassigned*
Swatches > New Mixed Ink Swatch	unassigned

Swatches > New Tint	*unassigned*
Swatch	
Swatches > Select All	*unassigned*
Unused	
Swatches > Small Name	*unassigned*
Swatches > Small Swatch	*unassigned*
Swatches > Swatch Options	*unassigned*
Tab > Clear All	*unassigned*
Tab > Repeat Tab	*unassigned*
Tags > Delete Tag	*unassigned*
Tags > Load Tags	*unassigned*
Tags > New Tag	*unassigned*
Tags > Save Tags	*unassigned*
Tags > Select All Unused	*unassigned*
Tags	
Tags > Small Palette Rows	*unassigned*
Tags > Tag Options	*unassigned*
Tags > Untag	*unassigned*
Transform > Flip Both	*unassigned*
Transform > Flip Horizontal	*unassigned*
Transform > Flip Vertical	*unassigned*
Transform > Reset Scaling to 100%	*unassigned*
Transform > Rotate 180°	*unassigned*
Transform > Rotate 90° CCW	*unassigned*
Transform > Rotate 90° CW	*unassigned*
Transform > Scale Text Attributes	*unassigned*
Transform > Transform Content	*unassigned*
Transform > Transform Group Content	*unassigned*
Transparency > Show Options	*unassigned*
Trap Presets > Assign Trap Preset	*unassigned*
Trap Presets > Delete Presets	*unassigned*
Trap Presets > Duplicate Preset	*unassigned*
Trap Presets > Load Trap Presets	*unassigned*
Trap Presets > New Preset	*unassigned*
Trap Presets > Preset Options	*unassigned*
Trap Presets > Select All Unused	*unassigned*

Structure Menu

Add Untagged Items	*unassigned*
Delete	*unassigned*
Delete DTD	*unassigned*
DTD Options	*unassigned*
Edit	*unassigned*
Go to Item	*unassigned*
Import DTD	*unassigned*
Map Styles to Tags	*unassigned*
Map Tags to Styles	*unassigned*
New Attribute	*unassigned*
New Comment	*unassigned*
New Element	*unassigned*
New Processing Instruction	*unassigned*
Select in Structure	*unassigned*
Show Attributes	*unassigned*
Show Comments	*unassigned*
Show Processing Instructions	*unassigned*
Show Text Snippets	*unassigned*
Tag Element	*unassigned*
Validate from Root Element	*unassigned*
View DTD	*unassigned*

Structure Navigation

Collapse element	*XML*-Left Arrow
Collapse element and child elements	*XML*-Alt+Left Arrow
Expand element	*XML*-Right Arrow
Expand element and child elements	*XML*-Alt+Right Arrow
Extend XML selection down	*XML*-Shift+Down Arrow
Extend XML selection up	*XML*-Shift+Up Arrow
Move XML selection down	*XML*-Down Arrow
Move XML selection up	*XML*-Up Arrow
Scroll structure pane down one screen	*XML*-Page Down
Scroll structure pane up one screen	*XML*-Page Up
Select first XML node	*XML*-Home
Select last XML node	*XML*-End
Select through first XML node	*XML*-Shift+Home
Select through last XML node	*XML*-Shift+End

View next validation error	*XML*-Ctrl+Right Arrow
View previous validation error	*XML*-Ctrl+Left Arrow

Tables Menu

Cell Options > Diagonal Lines	*unassigned*
Cell Options > Rows and Columns	*unassigned*
Cell Options > Strokes and Fills	*unassigned*
Cell Options > Text	*Tables*-Ctrl+Alt+B
Convert Table to Text	*unassigned*
Convert Text to Table	*unassigned*
Convert to Body Rows	*unassigned*
Convert to Footer Rows	*unassigned*
Convert to Header Rows	*unassigned*
Delete > Column	*Tables*-Shift+Backspace
Delete > Row	*Tables*-Ctrl+Backspace
Delete > Table	*unassigned*
Distribute Columns Evenly	*unassigned*
Distribute Rows Evenly	*unassigned*
Edit Footer	*unassigned*
Edit Header	*unassigned*
Go to Row	*unassigned*
Insert Table	*Text*-Shift+Ctrl+Alt+T
Insert > Column	*Tables*-Ctrl+Alt+9
Insert > Row	*Tables*-Ctrl+9
Merge Cells	*unassigned*
Select > Body Rows	*unassigned*
Select > Cell	*Tables*-Ctrl+/
Select > Column	*Tables*-Ctrl+Alt+3
Select > Footer Rows	*unassigned*
Select > Header Rows	*unassigned*
Select > Row	*Tables*-Ctrl+3
Select > Table	*Tables*-Ctrl+Alt+A
Split Cell Horizontally	*unassigned*
Split Cell Vertically	*unassigned*
Table Options > Alternating Column Strokes	*unassigned*
Table Options > Alternating Fills	unassigned
Table Options > Alternating Row Strokes	*unassigned*
Table Options > Headers and Footers	unassigned
Table Options > Table Setup	*Default*-Shift+Ctrl+Alt+B
To Body	*unassigned*
To Footer	*unassigned*
To Header	*unassigned*
Unmerge Cells	*unassigned*

Text and Tables

0°	*unassigned*
180°	*unassigned*
270°	*unassigned*
90°	*unassigned*
Align center	*Default*-Shift+Ctrl+C
Align force justify	*Default*-Shift+Ctrl+F
Align justify	*Default*-Shift+Ctrl+J
Align left	*Default*-Shift+Ctrl+L
Align right	*Default*-Shift+Ctrl+R
Align to baseline grid	*Default*-Shift+Ctrl+Alt+G
Apply bold	*Default*-Shift+Ctrl+B
Apply italic	*Default*-Shift+Ctrl+I
Apply normal	*Default*-Shift+Ctrl+Y
Auto leading	*Default*-Shift+Ctrl+Alt+A
Auto-hyphenate on/off	*Default*-Shift+Ctrl+Alt+H
Clear	*Tables*-Backspace
Decrease baseline shift	*Text*-Shift+Alt+Down Arrow
Decrease baseline shift x 5	*Text*-Shift+Ctrl+Alt+Down Arrow
Decrease kerning/tracking	*Text*-Alt+Left Arrow
Decrease kerning/tracking x 5	*Text*-Ctrl+Alt+Left Arrow
Decrease leading	*Text*-Alt+Up Arrow
Decrease leading x 5	*Text*-Ctrl+Alt+Up Arrow
Decrease point size	*Default*-Shift+Ctrl+,
Decrease point size x 5	*Default*-Shift+Ctrl+Alt+,

Decrease word space	*Default*-Ctrl+Alt+Backspace
Decrease word space x 5	*Default*-Shift+Ctrl+Alt+Backspace
Delete	*Tables*-Delete
Find Next	*Text*-Shift+F2
Increase baseline shift	*Text*-Shift+Alt+Up Arrow
Increase baseline shift x 5	*Text*-Shift+Ctrl+Alt+Up Arrow
Increase kerning/tracking	*Text*-Alt+Right Arrow
Increase kerning/tracking x 5	*Text*-Ctrl+Alt+Right Arrow
Increase leading	*Text*-Alt+Down Arrow
Increase leading x 5	*Text*-Ctrl+Alt+Down Arrow
Increase point size	*Default*-Shift+Ctrl+.
Increase point size x 5	*Default*-Shift+Ctrl+Alt+.
Increase word space	*Default*-Ctrl+Alt+\
Increase word space x 5	*Default*-Shift+Ctrl+Alt+\
Insert Column	*unassigned*
Insert Row	*unassigned*
Keep with Next Row	*unassigned*
Load Find and Find Next instance	*Text*-Shift+F1
Load Find with selected text	*Text*-Ctrl+F1
Load Replace with selected text	*Text*-Ctrl+F2
Move Down	Tables-Down Arrow
Move down one line	*Text*-Down Arrow
Move Left	*Tables*-Left Arrow
Move Right	*Tables*-Right Arrow
Move to beginning of story	*Default*-Ctrl+Home
Move to end of story	*Default*-Ctrl+End
Move to First Cell in Column	*Tables*-Alt+Page Up
Move to First Cell in Row	*Tables*-Alt+Home
Move to First Row in Frame	*Tables*-Page Up
Move to Last Cell in Column	*Tables*-Alt+Page Down
Move to Last Cell in Row	*Tables*-Alt+End
Move to Last Row in Frame	Tables-Page Down
Move to Next Cell	*Tables*-Tab
Move to Previous Cell	*Tables*-Shift+Tab
Move to the end of the line	Text-End
Move to the left one character	Text-Left Arrow
Move to the left one word	*Text*-Ctrl+Left Arrow
Move to the next paragraph	*Text*-Ctrl+Down Arrow
Move to the previous paragraph	*Text*-Ctrl+Up Arrow
Move to the right one character	Text-Right Arrow
Move to the right one word	*Text*-Ctrl+Right Arrow
Move to the start of the line	Text-Home
Move Up	*Tables*-Up Arrow
Move up one line	*Text*-Up Arrow
Normal horizontal text scale	*Default*-Shift+Ctrl+X
Normal vertical text scale	*Default*-Shift+Ctrl+Alt+X
Recompose all stories	*Default*-Ctrl+Alt+/
Recompose all stories immediately	*unassigned*
Replace with Change To text	*Text*-Ctrl+F3
Replace with Change To text and Find Next	*Text*-Shift+F3
Reset kerning and tracking	*Text*-Ctrl+Alt+Q
Select Cells Above	*Tables*-Shift+Up Arrow
Select Cells Below	*Tables*-Shift+Down Arrow
Select Cells to the Left	*Tables*-Shift+Left Arrow
Select Cells to the Right	*Tables*-Shift+Right Arrow
Select line	*Text*-Shift+Ctrl+\
Select one character to the left	*Text*-Shift+Left Arrow
Select one character to the right	*Text*-Shift+Right Arrow
Select one line above	*Text*-Shift+Up Arrow
Select one line below	*Text*-Shift+Down Arrow
Select one paragraph before	*Text*-Shift+Ctrl+Up Arrow

Select one paragraph forward	*Text*-Shift+Ctrl+Down Arrow
Select one word to the left	*Text*-Shift+Ctrl+Left Arrow
Select one word to the right	Text-Shift+Ctrl+Right Arrow
Select to beginning of story	*Text*-Shift+Ctrl+Home
Select to end of story	*Text*-Shift+Ctrl+End
Select to the end of the line	*Text*-Shift+End
Select to the start of the line	*Text*-Shift+Home
Start Row on Next Column	*Tables*-Num Enter
Start Row on Next Frame	*Tables*-Shift+Num Enter
Switch composer	unassigned
Toggle Autogrow	*unassigned*
Toggle Cell/Text Selection	*Tables*-Escape
Toggle Typographer's Quotes preference	*Default*-Shift+Ctrl+Alt+'
Update missing font list	*Default*-Shift+Ctrl+Alt+/

Tools

Add Anchor Point Tool	*Default*-=
Apply color	*Default*-,
Apply default fill and stroke colors	*Default*-D
Apply gradient	*Default*-.
Apply None	*Default*-Num /, *Default*-/
Button Tool	*Default*-B
Convert Direction Point Tool	*Default*-Shift+C
Delete Anchor Point Tool	*Default*--
Direct Selection Tool	*Default*-A
Ellipse Frame Tool	
Ellipse Tool	*Default*-L
Erase Tool	
Eyedropper Tool	*Default*-I
Free Transform Tool	*Default*-E
Gradient Tool	*Default*-G
Hand Tool	*Default*-H
Line Tool	*Default*-\
Measure Tool	*Default*-K
Pen Tool	*Default*-P
Pencil Tool	Default-N
Polygon Frame Tool	
Polygon Tool	
Rectangle Frame Tool	*Default*-F
Rectangle Tool	Default-M
Rotate Tool	*Default*-R
Scale Tool	*Default*-S
Scissors Tool	*Default*-C
Selection Tool	Default-V
Shear Tool	*Default*-O
Smooth Tool	
Swap fill and stroke activation	*Default*-X
Swap fill and stroke colors	*Default*-Shift+X
Toggle Text and Object Control	*Default*-J
Toggle view setting between default and preview	Default-W
Type on a Path Tool	*Default*-Shift+T
Type Tool	*Default*-T
Zoom Tool	*Default*-Z

Type Menu

Change Case > lowercase	*unassigned*
Change Case > Sentence case	unassigned
Change Case > Title Case	unassigned
Change Case > Uppercase	*unassigned*
Character	*Default*-Ctrl+T
Character > Styles	*Default*-Shift+F11
Create Outlines	*Default*-Shift+Ctrl+O
Fill with Placeholder Text	*unassigned*
Find Font	*unassigned*
Glyphs	*unassigned*
Insert Break Character > Column Break	*Text*-Num Enter
Insert Break Character > Even Page Break	*unassigned*
Insert Break Character > Forced Line Break	*Text*-Shift+Enter
Insert Break Character > Frame Break	*Text*-Shift+Num Enter
Insert Break Character > Odd Page Break	*unassigned*
Insert Break Character > Page Break	*Text*-Ctrl+Num Enter
Insert Break Character > Paragraph Return	*Text*-Enter
Insert Special Character > Auto Page Number	*Text*-Shift+Ctrl+Alt+N

Insert Special Character > Bullet Character	*Text*-Alt+8
Insert Special Character > Copyright Symbol	*Text*-Alt+G
Insert Special Character > Discretionary Hyphen	*Text*-Shift+Ctrl+-
Insert Special Character > Double Left Quotation Mark	*Text*-Alt+[
Insert Special Character > Double Right Quotation Mark	*Text*-Shift+Alt+[
Insert Special Character > Ellipsis	*Text*-Alt+;
Insert Special Character > Em Dash	*Text*-Shift+Alt+-
Insert Special Character > En Dash	*Text*-Alt+-
Insert Special Character > End Nested Style Here	*unassigned*
Insert Special Character > Indent to Here	*Text*-Ctrl+\
Insert Special Character > Next Page Number	*Text*-Shift+Ctrl+Alt+]
Insert Special Character > Nonbreaking Hyphen	*Text*-Ctrl+Alt+-
Insert Special Character > Paragraph Symbol	*Text*-Alt+7
Insert Special Character > Previous Page Number	*Text*-Shift+Ctrl+Alt+[
Insert Special Character > Punctuation Space	*unassigned*
Insert Special Character > Registered Trademark Symbol	*Text*-Alt+R
Insert Special Character > Right Indent Tab	*Text*-Shift+Tab
Insert Special Character > Section Marker	unassigned
Insert Special Character > Section Symbol	*Text*-Alt+6
Insert Special Character > Single Left Quotation Mark	*Text*-Alt+]
Insert Special Character > Single Right Quotation Mark	*Text*-Shift+Alt+]
Insert Special Character > Tab	Text-Tab
Insert Special Character > Trademark Symbol	*unassigned*
Insert White Space > Em Space	*Text*-Shift+Ctrl+M
Insert White Space > En Space	*Text*-Shift+Ctrl+N
Insert White Space > Figure Space	*unassigned*
Insert White Space > Flush Space	unassigned
Insert White Space > Hair Space	Text-Shift+Ctrl+Alt+I
Insert White Space > Nonbreaking Space	*Text*-Ctrl+Alt+X
Insert White Space > Thin Space	*Text*-Shift+Ctrl+Alt+M
Paragraph	*Default*-Ctrl+M, *Default*-Ctrl+Alt+T
Paragraph†Styles	*Default*-F11
Show Hidden Characters	*Default*-Ctrl+Alt+I
Size > Other > Other	*unassigned*
Story	*unassigned*
Tabs	*Default*-Shift+Ctrl+T
Type on Path > Delete Type from Path	*unassigned*
Type on Path > Options	*unassigned*

View Menu

Actual Size	*Default*-Ctrl+1
Allow Object-Level Display Settings	unassigned
Entire Pasteboard	*Default*-Shift+Ctrl+Alt+0
Fit Page in Window	*Default*-Ctrl+0
Fit Spread in Window	*Default*-Ctrl+Alt+0
Hide Rulers	*Default*-Ctrl+R
High Quality Display	*Default*-Ctrl+Alt+H
Ink Manager	*unassigned*
Lock Guides	*Default*-Ctrl+Alt+;
Optimized Display	*Default*-Ctrl+Alt+O

Overprint Preview	*Default*-Shift+Ctrl+Alt+Y
Proof Colors	*unassigned*
Proof Setup > Custom	*unassigned*
Proof Setup > Document CMYK	*unassigned*
Proof Setup > Working CMYK	*unassigned*
Show Baseline Grid	*Default*-Ctrl+Alt+'
Show Document Grid	*Default*-Ctrl+'
Show Frame Edges	*Default*-Ctrl+H
Show Guides	*Default*-Ctrl+;
Show Hyperlinks	*unassigned*
Show Master Items	*unassigned*
Show Structure	*Default*-Ctrl+Alt+1
Show Style Name Column	*unassigned*
Show Tag Markers	*unassigned*
Show Tagged Frames	*unassigned*
Show Text Threads	*Default*-Ctrl+Alt+Y
Snap to Document Grid	*Default*-Shift+Ctrl+'
Snap to Guides	*Default*-Shift+Ctrl+;
Typical Display	*Default*-Ctrl+Alt+Z
Zoom In	*Default*-Ctrl+Num +, *Default*-Ctrl+=
Zoom Out	*Default*-Ctrl+Num -, *Default*-Ctrl+-

Views, Navigation

200% size	*Default*-Ctrl+2
400% size	*Default*-Ctrl+4
50% size	*Default*-Ctrl+5
Access page number box	*Default*-Ctrl+J
Access zoom percentage box	*Default*-Ctrl+Alt+5
Activate last-used field in palette	*Default*-Ctrl+Alt+`
First Spread	*Default*-Shift+Alt+Page Up, *Default*-Home
Fit Selection in Window	*Default*-Ctrl+Alt+=
Force redraw	*Default*-Shift+F5
Go to first frame	*Default*-Shift+Ctrl+Alt+Page Up
Go to last frame	*Default*-Shift+Ctrl+Alt+Page Down
Go to next frame	*Default*-Ctrl+Alt+Page Down
Go to previous frame	*Default*-Ctrl+Alt+Page Up
Grids in Back	*unassigned*
Guides in Back	*unassigned*
Horizontal Ruler > Centimeters	*unassigned*
Horizontal Ruler > Ciceros	*unassigned*
Horizontal Ruler > Custom	*unassigned*
Horizontal Ruler > Inches Decimal	*unassigned*
Horizontal Ruler > Inches	*unassigned*
Horizontal Ruler > Millimeters	*unassigned*
Horizontal Ruler > Picas	*unassigned*
Horizontal Ruler > Points	*unassigned*
Last Spread	*Default*-Shift+Alt+Page Down, *Default*-End
Next window	*Default*-Ctrl+F6, *Default*-Ctrl+`
Open/Close all palettes in side tabs	*Default*-Ctrl+Alt+Tab
Open/Close palettes in left side tabs	*unassigned*
Open/Close palettes in right side tabs	*unassigned*
Previous window	*Default*-Shift+Ctrl+F6, *Default*-Shift+Ctrl+`
Ruler On Spine	*unassigned*
Ruler Per Page	*unassigned*
Ruler Per Spread	*unassigned*
Scroll down one screen	*Default*-Page Down, *Text*-Page Down
Scroll up one screen	*Default-Page* Up, *Text*-Page Up
Show 1st spot plate	*Default*-Shift+Ctrl+Alt+5
Show 2nd spot plate	*Default*-Shift+Ctrl+Alt+6
Show 3rd spot plate	*Default*-Shift+Ctrl+Alt+7
Show 4th spot plate	*Default*-Shift+Ctrl+Alt+8
Show 5th spot plate	*Default*-Shift+Ctrl+Alt+9
Show all plates	*Default*-Shift+Ctrl+Alt+~
Show Black plate	*Default*-Shift+Ctrl+Alt+4

Show Cyan plate	*Default*-Shift+Ctrl+Alt+1
Show Magenta plate	*Default*-Shift+Ctrl+Alt+2
Show Yellow plate	*Default*-Shift+Ctrl+Alt+3
Show/Hide all palettes	*Default*-Tab
Suppress overrides (view optimized)	*Default*-Ctrl+.
Toggle all palettes except toolbox	*Default*-Shift+Tab
Toggle between current and previous views	*Default*-Ctrl+Alt+2
Toggle Character and Paragraph Modes in Control Panel	*Default*-Ctrl+Alt+7
Toggle Keyboard Focus in Control Palette	*Default*-Ctrl+6
Toggle Measurement System	*Default*-Shift+Ctrl+Alt+U
Vertical Ruler > Centimeters	unassigned
Vertical Ruler > Ciceros	*unassigned*
Vertical Ruler > Custom	*unassigned*
Vertical Ruler > Inches	*unassigned*
Vertical Ruler > Inches Decimal	*unassigned*
Vertical Ruler > Millimeters	unassigned
Vertical Ruler > Picas	*unassigned*
Vertical Ruler > Points	*unassigned*

Window Menu

Align	*Default*-Shift+F7
Attributes	*unassigned*
Bookmarks	*unassigned*
Cascade	*unassigned*
Clear Local Display Settings	*unassigned*
Color	*Default*-F6
Control	*Default*-Ctrl+Alt+6
Delete Workspace	unassigned
Flattener	unassigned
Gradient	*unassigned*
Hyperlinks	*unassigned*
Index	*Default*-Shift+F8
Info	*Default*-F8
Layers	*Default*-F7
Links	*Default*-Shift+Ctrl+D
Load 1st Workspace	*unassigned*
Load 2nd Workspace	*unassigned*
Load 3rd Workspace	unassigned
Load 4th Workspace	*unassigned*
Load 5th Workspace	*unassigned*
Navigator	*unassigned*
New Window	*unassigned*
Pages	*Default*-F12
Pathfinder	*unassigned*
Save Workspace	*unassigned*
Script Label	*unassigned*
Scripts	*unassigned*
Separations	*Default*-Shift+F6
States	*unassigned*
Stroke	*Default*-F10
Swatches	*Default*-F5
Table	*Default*-Shift+F9
Tags	*unassigned*
Text Wrap	*Default*-Ctrl+Alt+W
Tile	*unassigned*
Tools	*unassigned*
Transform	*Default*-F9
Transparency	*Default*-Shift+F10
Trap Presets	*unassigned*

INDEX

A

absolute numbering, 252
absolute offset, 192
Add Anchor Point tool, 174, 180
Adobe Paragraph Composer, 359
Advanced PDF options, 452
alignment
  to baseline grid, 367
  horizontal, 96
  object, 96–98
  optical margin, 358
  paragraph, 62
  stroke, 146
  tab, 281
  text on a path, 223
  types of, 62
  vertical, 96
Align palette, 96–98
  Align Objects icons, 96
  defined, 2
  Distribute Objects icons, 97
  Distribute Spacing icons, 97
  illustrated, 2, 96
  opening, 2, 96
  Use Spacing option, 98
  See also palettes
alpha channels
  applying, to images, 209
  as clipping paths, 206
  illustrated, 209
  naming, 209
anchor points
  adding, 174, 180
  corner, 169, 170, 171, 175
  defined, 168
  deleting, 179, 180
  deleting, from path, 174
  dragging, 170
  handles, extending, 171
  handles, retracting, 171
  modifymg, 175
  moving, 172
  selecting/moving, 172
  smooth curve, 171, 175
  types of, 168
  use rules, 171
angles, measuring, 105
AppleScript, 356
Application menu, keyboard shortcuts (Mac), 502
Apply Master dialog box, 247
arrowheads, 156
artwork. *See* graphics
Attributes palette
  defined, 2
  illustrated, 2, 136
  Nonprinting option, 418
  opening, 2, 136
  See also palettes
autoflow text cursor, 243
auto leading, 57, 363
automatic drop cap styling, 342–343
automatic hyperlinks, 390
automatic page numbering, 251
automatic tiling, 423

B

background, color, 36, 494
baseline grid, 366–367
  aligning text to, 367
  defined, 366
  first line alignment to, 367
  options, 493
  positioning, 493
  setting, 366
baselines
  defined, 58
  first, in cells, 305
  first, offset, 70
baseline shift
  controls, 58
  defined, 58
  text on a path, 223
behaviors, 409–415
  application example, 414
  applying, 409
  Close, 410
  deactivating, 413
  defined, 409
  deleting, 413
  dragging, 412
  editing, 412
  events, changing, 412
  Exit, 410
  Go To First Page, 410
  Go To Last Page, 410
  Go To Next Page, 410

Go To Next View, 410
Go To Previous Page, 410
Go To Previous View, 410
Go To URL, 410
list, 410
mouse events, 409
Movie, 411
multiple, applying, 412
Open File, 411
positioning, 412
selecting, 409
Show/Hide Fields, 411
Sound, 411
View Zoom, 411
***See** also* buttons
bevel joins, **145**
Bezier curves, 168
black point, **377**
bleed area, 19
color, 494
defined, 426
EPS, 466
need for, 426
setting, 426
bleed guides, 28
Bleed Mode, 35
blend modes, 158–159
adding, 158
illustrated effects, 159
knockout groups, 158
list of, 159
bookmarks, 380, 391–393
advantages\disadvantages, 380
creating, 391
defined, 380
deleting, 392, 393
destination, 392
dragging, **393**
moving, 393
naming, 392
nesting, 393
renaming, 392
unnesting, 393
***See** also* interactive elements
Bookmarks palette, 391–393
defined, 2
illustrated, 2, 391
menu
Delete Bookmark command, 392
New Bookmark command, 391
Rename Bookmark command, 392
Sort Bookmarks command, 393
opening, 2, 391
***See** abo* palettes
Book Page Numbering Options dialog box, 256
Book palette, 253–257
document names, double-clicking, 254
menu, 253
Add Document command, 253
Book Page Numbering Options command, 256
Document Page Numbering Options command, 256
Export Book to PDF command, 257
Preflight Book command, 257
Print Book command, 257
Remove Document command, 253
Repaginate command, 256
Replace Document command, 255
Synchronize Book command, 254
Synchronize Options command, 255
missing icon, 255
opening, 253
Style Source box, 254
books
creating, 253–257
documents, adding, 253
documents, numbers, 256
documents, opening, 254
documents, removing, 253
documents order, 254
electronic file creation, 253
files, exporting, 257
files, replacing, 255
files, updating, 255
indexes, 263–264
packaging, 257
page number adjustment, 256
pagination, 256
preflight, 257
printing, 257
table of contents (TOC), 258–262
borders
adding, 306
color/tint, 306
stacking order, 308
break characters, 244
bullpen, **75**
butt caps, 145
Button dialog box, 401
Button Options dialog box
Add button, 409
Behavior menu, 409
behaviors list, 413
Behaviors tab, 409, 412
Delete button, 413
Event menu, 409
General tab, 403
opening, 403

Update button, 412
buttons, **401–415**
advantages/disadvantages, 380
appearance, applying, 408
behaviors, **409–415**
clicking, 415
converting objects to, 401
creating, manually, 401
creating, **numerically,** 401
defined, 380
images, adding, 402
properties, 403
text, importing, 402
text, typing, 402
themes, 408
See also interactive elements
button states
adding, 404
changing, by object selection, 407
content, deleting, 407
converting, 405
creating, with imported artwork, 406
deleting, 404
disabling, 405
Down, 404
editing, 406
enabling, 405
Rollover, 404
understanding, 404
Up, 404
Button tool, 401

C

caps, 145
case, changing, 316
Cell Options dialog box
Cell Fill controls, 308
Cell Inset fields option, 304
Clip Contents to Cell option, 302
Diagonal Lines options, 312
First Baseline area, 305
illustrated, 297
Keep with Next Row option, 298
Line Stroke controls, 312
opening, 297, 298
Rows and Columns category, 297
Start Row menu, 298
Vertical Justification Align menu, 304, 305
cells
contents, **copying/pasting,** 296
contents, deleting, 295
customizing, 303–305
diagonal lines, 312
fill, customizing, 308
first baseline, 305
formatting, preserving, 306
formatting, setting, 288
inserting graphics into, 302
inserting text in, 290
insertion point, 289
merging, 303
moving between, 290
preview, 307
selecting, 287
splitting, 303
strokes, customizing, 307
text, options, 304
text, selecting, 291
text, vertical alignment, 304
unmerging, 303
vertical justification spacing, 305
See also tables
Change Format Settings dialog box, 322, 323
Character palette
Baseline shift controls, 58
defined, **2**
electronic style options, 55
font menu, 54
Horizontal scale controls, 59
illustrated, **2, 53**
Kerning controls, 57
Language menu, 60
Leading controls, 57
menu, 53
OpenType submenu, 368
Show Options command, 53
opening, **2, 53**
options, 53
point size menu, 54
Skew controls, **59**
style menu, 54
Tracking controls, 58
Vertical scale controls, 59
working with, 53
See also palettes
characters
attributes, sampling, 349
break, 244
hidden, 66
Indent to Here, 64
inserting, 67
separator, 261
settings preferences, 488
settings with Control palette, 72
spacing, 57–58
special, 73
white space, 73

wildcard, 321
See also character styles; text
Character Style Options dialog box, 339,340
character styles, **333**
applying, 337
automatic drop cap, 342
defining, **333**
defining, by example, 333
keyboard shortcuts, 335
overriding, 338
strategies, 337
Tag for En Dash, 340,341
See also paragraph styles; styles
Character Styles palette, **333**
defined, 3,333
Delete Styles command, 339
illustrated, 3,333
opening, 3
Redefine Style command, 339
See also palettes
Check Spelling dialog box, 316–317
illustrated, 316
Search list, 316
Choose Movie Frame as Poster dialog box, 399
clipboard options, 487
Clipping Path dialog box, 205–207
Alpha Channel option, 206
Detect Edges option, 206
illustrated, 205,206
Include Inside Edges option, 207
Inset Frame field, 207
Invert option, 207
opening, 205
Path menu, 205
Restrict to Frame option, 207
Threshold slider, 206
Tolerance slider, 206
Type menu, 205
Use High Resolution Image option, 207
clipping paths, 204–207
alpha channels as, 206
choosing paths as, 205
converting, to frames, 205
creating, from images, 206
defined, 204
deleting, 207
effects, modifying, 207
illustrated, 204
importing files with, 204
shape, modifymg, 205
uses, 207
CMYK colors
creating, 110
defined, **110**
defining, **112**
understanding, 113
uses, 112
working space, **375**
See also colors
color management, 373–378
CMYK working space, 375
complexity, 373
conversion options, 377
policies, 376
profiles, 378
RGB working space, 375
settings selection, 374–377
turning on, 374
Color palette, 112–115
color ramp, 115
Container icons, 138
defined, **3**
Fill icon, 120,138
illustrated, **3**
menu, 112
Add to Swatches command, 115
CMYK command, 112
Lab command, 114
RGB command, 113
None icon, 141
opening, 3,112
options, choosing, **112**
Stroke icon, 120,142,143
Text icons, 139
tinting swatches with, 130
transferring colors from, 115
See also palettes
colors, 109–136
adding, to Swatches palette, 117
applying, to fills/strokes, 115
basics of, 110–111
bleed, 494
border, 306
CMYK, 110,112
columns, 494
default, creating, 123
dragging, **115**
dragging, into Swatches palette, 117
EPS, 465
frame fill/stroke, 198
gradients, 132–135
grayscale images, 198
hidden characters, 66
information review, 446
LAB, **111, 114**
layer, 268
mapping, 433
margins, 494

Mixed **Inks,** 111,126–129
models, **112**
naming, 123
onscreen element, 494
out-of-gamut, 114
overprinting, 136
paragraph rule, 225
preview background, **494**
printing, 427
process, 119
registration, 117
RGB, **110, 113**
sampling, 135
slug, 494
spot, 111,119
storing, 135
stroke gap, 147
tints, 111,130–131
transferring, from Color palette, 115
unnamed, 116,123
unused, cost of, **122**
working with, 109–136
Color Settings dialog box
Advanced Mode checkbox, 374
CMYK Color Management Policy menu, 376
Enable Color Management checkbox, 374
Engine menu, 377
illustrated, **374**
Intent menu, 377
Missing Profiles option, 376
opening, 374
Profile Mismatches options, 376
RGB Color Management Policy menu, 376
Settings menu, 374
Use Black Point Compensation checkbox, 377
Working Space CMYK menu, 375
Working Space RGB menu, 375
color stops, 132
adding, 133
defined, 133
deleting, 133
selecting, 132, 134
column guides
defined, 28
illustrated, 28
moving, 29
See *also* guides
columns
adding, while dragging, 295
alternate repeating strokes, 309
automatically distributing, 298
colors, 494
creating, 69
creating, with guides, 30
deleting, 295
fixed width, 69
gutter width, 18
inserting, 294
number of, 18,285,293
selecting, 291
setting, 22
width, changing, 297
working with, 293–298
See *also* rows; tables
composition, 359
Composition preferences, 490–491
defined, 482
Highlight settings, 490
illustrated, 482
Justify Text Next to an Object checkbox, 491
Skip to Leading checkbox, 491
Text Wrap controls, 491
Text Wrap Only Affects Text Beneath checkbox, 491
See *also* Preferences dialog box
compound paths, 141
compound shapes, 184
Compression PDF options, 456–458
Compression menu, 457,458
defined, **451**
Downsampling menu, 457
illustrated, 451,456
Image Quality menu, 457
Resolution fields, 456,458
Sampling menu, 456
See *also* Export PDF dialog box
Configure Plug-in dialog box, 500
container objects, **101**
content objects, **101**
contextual menus
defined, 16
displaying, 16
Display Performance dialog box, 211
ruler, 26
control handles
defined, **168**
extending, 171
moving, 172
retracting, 171
smooth curve point, 175
use rules, 171
Control palette
Character icon, 72
context sensitivity, 103
defined, **3**
features, 314
Fit icons, 191
illustrated, **3**
for objects, 103

opening, 3, 313
Paragraph icon, 72
Select Object options, 103
for text, 72
Transform/Stroke palette options, 103
See also palettes
Convert Direction Point tool, 175
Convert Text to Table dialog box, 286
copying
artwork between graphic frames, 183
documents, **43**
fonts, 448
objects, 81
table cells, 296
text, 52
comer curves, 170
corner effects, 156
Comer Effects dialog box, 156
comer points, 169,171
curve, 170
dragging, 175
handles, extending, **171**
handles, retracting, 171
See also anchor points
Create Guides dialog box, 30
Create Package Folder dialog box, 447
cursors
angle, 105
autoflow text, 243
curved double-headed arrow, 89
double-headed arrow, **81, 89**
fixed page autoflow, 243
Hand, 40
left/right arrow, 297
link text, 68
loaded image, 182
loaded text, 68,238,240
Movie Clip, 396
semi-autoflow, 242
slanted arrow, 292
up/down arrow, 296
curves
Bezier, 168
changing, 171
corner, 170
drawing, 170
smooth, 170
Custom Spread Flattener Settings dialog box, 438

D

dashed strokes, 148,151
defaults
color, 123
document, 22
object, 166
previews, 210
setting, 22
view settings, 497
workspace, 14
Define Printer Presets dialog box, 441–442
Delete button, 441
Edit button, 441
Export button, 441
Import button, **442**
New button, 441
Delete Anchor Point tool, 174,180
Delete Workspace dialog box, 14
destinations
defined, 382
deleting, 384
editing, 384
existing, hyperlink creation from, 385
moving, 390
page, 382,386
text anchor, 383,386
URL, 383,387
See also hyperlinks
diagonal lines, 312
Dicolor library, 125
dictionary, 318,366
hyphenation exceptions, 496
language options, 495
preferences, 495–496
user, preferences, 496
Dictionary dialog box, 318
Composition Using menu, 496
defined, 483
Double Quotes menu, 495
illustrated, 483
Language controls, 495,496
Single Quotes menu, 495
Direct Selection tool, 190,289
for clipping path manipulation, 205
defined, **79**
illustrated, 172
moving control handles with, 172
in moving **inline** graphics, 196
moving points with, 172
in nested element selection, 194
Opt/Alt key with, **85, 99, 101, 189, 194**
plus (+) sign, 85
discretionary hyphens, 365
Display Performance dialog box, 210–213
Adjust View Settings area, 212,498
contextual menu, 211
Default View Settings menu, 210,497
defined, 484

Enable Anti-Aliasing checkbox, 498
Greek Type Below field, 498
Ignore Local Settings checkbox, **497**
illustrated, 210, 484
Preserve Object-level Display Settings option, **210**
Raster Images slider, 212
Transparency slider, 213
Vector Graphics slider, 212
distributing, 97–98
defined, **97**
horizontal, **97**
objects, **97, 98**
space between objects, **97**
vertical, 97
docking palettes, 13
document grids
appearance, changing, 32
displaying, 32
hiding, 32
positioning, 493
preferences, 493
snapping to, 32
Document Page Numbering Options dialog box, 256
document presets, 24–25
applying, 24
creating, 25
defined, 24
deleting, 25
editing, 24
exporting, 25
importing, 25
saving, 24
Document Presets dialog box, 24–25
document rulers, 26–27
contextual menu, 26
hiding, 26
horizontal, 26
origin, setting, 27
showing, 26
unit, setting, 492
unit of measurement, changing, 26
vertical, 26
zero point, repositioning, 27
documents
adding, to book, 253
adding library items to, 275
bleed area, 19
closing, 43
columns, 18
copying, 43
defaults, 166
defaults, setting, 22
information, 106
margins, **18, 21**
naming, 42
new, 18
opening, 44
opening, in book, 254
order, controlling, 41
order, in book, 254
orientation, **18, 21**
packaging, **447**
pages, 18
printing, 418
recently saved, **44**
recovering, 44, 499
removing, from book, 253
reverting to, 43
saving, 42
sections, 251–252
settings, saving, 24
setting up, 17–44
slug area, 19
starting, 18–19
transferring styles from, 336
in two windows, 41
Document Setup dialog box
illustration, 23
opening, 23
Orientation option, 23
Page Size option, 20
document windows
controlling, 41
magnification list, 34
navigation controls, 234
page list, 234
dotted stroke style, 152
Down state, 404
drop caps
attributes, 325
automatic styling, 342–343
controls, 65
creating, 65
defined, 65
paragraph styles, **331**
Drop Caps and Nested Styles dialog box, 342, 345–346
Character Style menu, **345**
Duration menu, 345
illustrated, **345**
New Nested Style button, 345
opening, 345
Repeating Element menu, 345, 346
Drop Shadow dialog box, 161–162
Drop Shadow checkbox, 161, 162
illustrated, 161
opening, 161
drop shadows, 161–162
adding, 161

for frames, 213
for images, 213
removing, 162
duplicating
layers, 266
multiple objects, 83
objects, 82
pages, 235
styles, 334
swatches, 122
text, 52

E

Edit Document Preset dialog box, 25
Edit menu
Check Spelling command, 316
Clear command, 175
Color Settings command, 374
Copy command, **52, 82, 183, 296**
Cut command, **52, 82, 100, 102, 183, 296**
Duplicate command, **52, 82**
Edit Dictionary command, 318,366
Edit in Story Editor command, 326
Edit Shortcuts command, 479
Keyboard Shortcuts command, 478
keyboard shortcuts (Mac), 502
keyboard shortcuts (Win), 514–515
Paste command, **52, 82, 102,** 196,296
Paste In Place command, 82
Paste Into command, 100,102,183,193
Preferences submenu, 481
Display Performance command, 210,212
Grids command, 32,366
Guides &Pasteboard **command, 28, 36**
Story Editor Display command, 327
Units & Increments command, **26, 27**
Select *All* command, **79**
Step and Repeat command, 83
Edit Stroke Style dialog box, 152
electronic styles, 55–56
customizing, 56
defined, **55**
illustrated, **55**
myths and realities, 60
Ellipse dialog box, **48, 77**
Ellipse tool
in drawing elliptical frames, 46
Opt/Alt key with, 48
elliptical frames, **46, 77**
Elliptical Frame tool, 77
embedding graphics, 203
em spaces, 73
en dashes, 341
End Nested Style Character, 346
end shapes, 156
en spaces, 73
EPS files, 464–466
bleed size, 466
colors, 465
creating, 464
data format, 466
embedding fonts in, 466
images import options, 187
page options, 464
Postscript level, 465
preview, 465
EPS Import Options dialog box, 187
Erase tool, 180
deleting paths with, 179
dragging, 179
illustrated, 179
Excel
importing tables from, 287
import options, 239
Export dialog box
Adobe PDF, 450,451–463
EPS, 450,464–466
InDesign Interchange, 450,467
JPEG, 450,467–468
opening, 450
Save as File Type options, 450
SVG, **450, 469–471**
Text, 450,472
Export EPS dialog box, 464–466
Advanced tab, 464
Bleed fields, 466
Color menu, 465
Data Format menu, 466
Embed Fonts menu, 466
General tab, 464
illustrated, 464
Pages area, 464
Postscript menu, 465
Preview menu, 465
exporting, 449–475
book files to PDF, 257
document presets, 25
EPS files, 464–466
formats, 450
hyperlinks, 390
interactive PDFs, 416
JPEG files, 467–468
PDF files, 451–463
PDF presets, 463
printer presets, 441
SVG files, 469–471
text, 472

Export JPEG dialog box, 467–468
Export options, 467
Format menu, 468
illustrated, 467
Image Quality menu, 468
Export Options dialog box, 350
Export PDF dialog box, 451–463
Advanced, 452, 459
categories list, 451
Compression, 451, 456–458
General, 451, 453–455
Marks and Bleeds, 452
Save Preset button, 462
Security, 452, 460–461
Summary, 452
See also Export dialog box; exporting
Eyedropper Options dialog box, 164, 348
Eyedropper tool, 135, 164–165
black eyedropper, 164, 349
double-clicking, 348
illustrated, 135
Opt/Alt key with, 165, 349
options, 164
precision, 165
for sampling/applying object attributes, 164
for sampling/storing colors, 135
for text, 348–349
using, 135, 164–165
white eyedropper, 164, 349

F

facing pages
defined, **20**
margin settings for, 21
setting, **18, 20**
See also spreads
false italic, 59
Feather dialog box, 162
feathers, 162
figure spaces, 73
File Handling preferences, 499
defined, 484
Document Recovery Data, 499
illustrated, 484
Save Document Preview Image, 499
Saving InDesign Files area, 499
Version Cue control, 499
See also Preferences dialog box
File menu
Close command, **43**
Document Presets submenu
Define command, **24, 25**
presets, 24
Document Setup command, **22, 23**
Export command, 350, 416, 450, 472
keyboard shortcuts (Mac), 502–503
keyboard shortcuts (Win), 515
New submenu, 73
Book command, 253
Document command, **18, 24**
Library command, **5**
Open command, 44, 255
Open Recent command, 44
Package command, **447**
PDF Export Presets command, 462
PDF Presets command, 462
Place command, 182, 183, 196, 208, 209
Preflight command, **444**
Print command, 418, 424, 443
Printer Presets submenu, 441
Redo command, 43
Revert command, 43
Save a Copy command, 43
Save As command, **42, 43, 44**
Save command, **42, 43**
Undo command, **43**
files
book, 255
copying, 43
maintaining, 42–44
missing, 255
naming, 42
opening, 44
packaging, 447
PageMaker, opening, 44
Postscript, 443
QuarkXPress, opening, 44
recovering, 44
replacing, 255
saved, preview, 499
saving, 42
text, 489
updating, 255
fills
alternate repeating, 311
applying, 138–141
applying colors to, 115
cell, customizing, 308
defaults, 166
dragging, onto objects, 138
gradient, 139–140
None, 141
for selected text, 139
setting, to overprint, 136
stroke settings swap, 142
for text in a frame, 139
See also strokes

Find/Change dialog box
Case Sensitive option, 319
Change All button, 320,341
Change button, 320
Change/Find button, 320,341
Change to field, 319,341
expanded options, 321
Find Next button, 320
Find what menu, 321,341
Format button, 322,323
illustrated, 319
metacharacters menu, 320
More Options button, 321
opening, 319
Search list, 319
Whole Word option, 319
Find Font dialog box, 352
Find Format Settings dialog box, 322
Advanced Character Formats, 324
Basic Character Formats, 324
Character Color, 325
Drop Caps and Other, 325
illustrated, 323
Indents and Spacing, 324
Keep Options, 324
opening, 323
OpenType Features, 325
Strikethrough Options, 325
Style Options, 324
Underline Options, 325
finding/changing, 319–325
changes, applying, 320
formatting, 321
instances, ignoring, 320
metacharacters, 320
options, expanding, 321
text strings, 319
wildcard characters, 321
first-character inline graphics, 197
fixed page autoflow cursor, 243
flattener presets, 436–440
applying, 438
creating, 436
deleting, 437
editing, 437
loading, 437
naming, 437
previewing, 439–440
saving, 437
setting, 435
Flattener Preview palette, 439–440
Apply Settings to Print button, 439
Auto Refresh Highlight checkbox, 439
defined, 3
Highlight menu, 439,440
Ignore Spread Overrides checkbox, 439
illustrated, 3,439
opening, 3,439
Preset menu, 439
Refresh button, 439
See *also* palettes
flattening, 438
flipping objects, 94
flowing text, 240–244
autoflow, 243
loaded text cursor and, 240
manually, 241
onto fixed number of pages, 243
semi-autoflow, 242
flush spaces, 73
Focoltone library, 125
Font Alert, 448
fonts
changing, 352
copying, 448
defined, 54
embedding, 459,466
information for printing, 434
information review, 445
legal issues, 448
missing, replacing, 352
non-Latin, 489
PDF, 458,459
selecting, 54
subsetting, 458
subsetting threshold, 486
SVG file, 470
using, 60
footers, 300–301
adding, 300
converting, into body cells, 301
converting cells to, 301
defined, 285
repeat options, 300
rows, 293
See *also* tables
formatting
cells, 288,306
character, 53, 61
character, overriding, 338
finding/changing, 321
options, deleting, 323
options, replacing, 323
options, searching, 322
frames
defined, 76
display, 76
graphic, 76, 77–78

selecting, 108
types of, 76
unassigned, **47, 48, 76**
See also text frames
FreeHand, path conversion to frames, 186
Free Transform tool, 89

G

General PDF options, 453–455
Compatibility menu, **453**
defined, 451
illustrated, 451
Include settings, **454**
Multimedia menu, **455**
Options controls, 454
Pages area, 453
Standard menu, **453**
See also Export PDF dialog box
General preferences, 485–487
Clipboard options, 487
defined, 481
Floating Tools Palette menu, 486
Font Downloading and Embedding option, 486
illustrated, 481
Page Numbering View menu, 485
Print Options area, 486
Reset All Warning Dialogs button, 487
Tool Tips menu, 485
See also Preferences dialog box
Generate Index dialog box, 264
GIF files
artwork comparison, **474**
options, setting, 475
glyphs, 67
categories, displaying, 369
defined, 67
scaling, 362
Glyphs palette
defined, **3, 67**
illustrated, **3, 67, 369**
opening, **3, 67, 369**
Show list, 369
viewing categories in, 369
See also palettes
GoLive
designing documents for, **473**
image copying settings, 474
packaging for, **473–475**
Go to Row dialog box, 290
Grabber tool. *See* Hand tool
gradient fills, 139–140
adjusting, 140
applying, 139
See also fills
Gradient Options dialog box, 133
Gradient palette, 134–135
defined, **4**
gradient preview, 135
illustrated, 4, 134
menu, 134
opening, 4, 134
See also palettes
gradients, 132–136
color stops, adding, 133
color stops, deleting, 133
defined, 132
defining, 132
linear, 132
modifying, **133**
process colors, 134
radial, 132, 140
spot colors, 134
unnamed, creating, 134
unnamed, storing, 135
See also colors
gradient strokes, 143
Gradient tool, 140
graphic file formats, 183
graphic frames, 77–78
creating, 76
defined, 76
diagonal lines in, 76
elliptical, 77
fill/stroke color, **198**
importing paths as, **186**
modifying, **190**
moving/copying artwork between, 183
nesting, 193
placing artwork in, 183
polygon, 78
rectangular, 77
replacing artwork in, 183
resizing, **191**
selecting, 108, 183
selecting/moving, 189
specialty, 184–186
text conversion to, 185
See also frames
graphics, 181–213
adding, to tables, 302
applying alpha channels to, 209
applying effects to, 213
centering, 191
default view, switching, **211**
dragging, from vector programs, 186
fitting, in frames, 191–192
inline, 196–197

linked, 199–202
modifying, 190
moving/copying, between frames, 183
nesting, 193–195
numerically positioning, 192
pixel-based, 200
placing, into frame, 183
placing, without frame, 182
preview, default appearance, **210**
preview, individual, 211
raster display, **212**
replacing, 183
resizing, 191
selecting, 189
selecting/moving, 189
state creation with, 406
styling, 198
SVG file, 470
transforming, 192
unembedding, 203
vector, 200
vector display, **212**
viewing, 210–213
working with, 189–190
grayscale images, coloring, 198
greeking, 498
Grid Preferences dialog box, 32
Baseline Grid settings, 366, 493
defined, 483
Document Grid controls, 493
Grids in Back option, **493**
illustrated, 483
groups
Control palette with, 103
creating, 99
mixed ink, 127–128
nesting, 99
reasons for using, 102
selecting objects within, 99–100
ungrouping, 100
Group Selection tool, **85, 99, 194**
guides, 28–31
bleed, 28
column, **28, 29, 30**
defined, 28
display, 28
hiding, 28
illustrated, 28
layer, controlling, 270
locking, **31**
margin, 28
preferences, 28, 494
row/column creation with, 30
ruler, **28, 29, 30, 31**
showing, 28
slug, 28
snapping to, 29
types of, 28
Guides & Pasteboard preferences, 36
defined, 483
Guide options, 493
illustrated, 483
Margins Color menu, 494
Minimum Vertical Offset option, **494**
gutters
setting, 22
width, 18

H

hair spaces, **73**
Hand tool, 38
hanging bullets, 63
headers, 300–301
adding, 300
converting, into body cells, 301
converting cells to, 301
defined, 285
repeat options, 300
rows, 293
See also tables
Help menu
Configure Plug-ins command, 500
keyboard shortcuts (Mac), 503
keyboard shortcuts (Win), 515
hidden characters
colors, changing, 66
defined, 66
displaying, 66
illustrated, 66
hidden layers
setting, 269
text wrap control, 270
highlight
options, 490
pink, 490
text, 139
underline effect as, 56
HKS library, 125
horizontal scaling, **59**
hotspots, 380
HTML pages, 449
Hyperlink Destination Options dialog box, 384
hyperlinks, 381–390
advantages/disadvantages, 380
appearance, 388
automatic, 390
creating, from existing destination, 385

defined, 380,381
destinations, 381–387
editing, 389
exporting, 390
moving, 390
page, 381,386
source, 381
source, resetting, 389
testing, 390
text anchor, 381,386
tips for, 389
type, selecting, 381
updating, 389
URL, 381, 387
See also interactive elements
Hyperlinks palette, 381–390
defined, 4
illustrated, 4,381
menu
Delete Hyperlink command, 390
Go to Destination command, 390
Go to Source command, 390
Hyperlink Destination Options command, 384
Hyperlink Options command, 389
New Hyperlink Destination command, 381
Reset Hyperlink command, 389
Update Hyperlink command, 389
opening, 4,381
See also palettes
hyphenation
automatic, 364
changing to en dashes, 341
controlling, 364–366
discretionary, 365
editing, 366
exceptions, 496
paragraph styles, 330
preferences, 365
turning on, 66,364
units, 364
Hyphenation Settings dialog box, 364

Illustrator
best file format from, 187
dragging from, 186
transparency and, 208
Image Color Settings dialog box, 378
Image Import Options dialog box, 187,204,208,209
images. ***See*** graphics
imported graphics. ***See*** graphics
importing
document presets, 25
image options, 187–188
paths as frames, 186
PDF presets, 463
printer presets, 441
from spreadsheets, 288
styles, 336
swatches, **122**
tagged text, 351
text, 238–239
text into buttons, 402
text into frames, 240
transparent images, 208–209
import options, 187–188
EPS images, 187
PDF files, 188
pixel images, 187
Import Options dialog box, 182
InCopy, 472
indents
manual, inserting, 64
margin, 63
paragraph styles, 329
TOC entries, 262
Indent to Here character, 64
InDesign Interchange Format, 467
InDesign menu
Configure Plug-ins command, 500
Preferences submenu, 481
Display Performance command, 210, 212
Grids command, 32,366
Guides & Pasteboard command, **28, 36**
Story Editor Display command, 327
Units & Increments command, **26, 27**
InDesign Tags Import Options dialog box, 351
indexes, 263–264
art of, 264
creation methods, 263
file generation, 264
reference application, 263
Index palette, 263–264
Add button, 263
defined, **4**
illustrated, 4,263
menu
Generate Index command, 264
New Page References command, 263
opening, 4,263
Reference button, 263
See also palettes
Info palette
defined, 4
document information, 106
illustrated, **4**
object information, 106

with objects, 106
opening, 4
text information, 106
See also palettes
Ink Manager, 432–433
Alias menu, 433
color icons, 432
defined, 432
illustrated, 432
opening, 432
inline graphics, 196–197
in cells, 302
creating, 196
defined, 196
first-character, 197
forcing text around, 197
illustrated, 196
importing images as, 196
uses, 196
See also graphics
Insert Column(s) dialog box, 294
insertion points
cells, 289
creating, 72
moving, 49
Insert Pages dialog box, 232
Insert Row(s) dialog box, 294
Insert Table dialog box, 285
interactive PDF elements, 379–416
bookmarks, 380, 391–393
buttons, 380, 401–415
hyperlinks, 380, 381–390
movies, 396–400
sounds, 394–395
types of, 380
interactive PDFs
creating, 414–415
exporting, 416
invisibles. *See* hidden characters
island spreads, 236
ISO (International Organization for Standardization), 453
Item Information dialog box, 276

J

Japanese topography
keyboard shortcuts (Mac), 503
keyboard shortcuts (Win), 515
joins, 145
JPEG files
area/page conversion, 467
artwork comparison, 474
display, 468
exporting, 467–468
quality, 468
justification
attributes, 325
best settings, 361
in cells, 305
controls, 360–363
letter spacing, 361
paragraph styles, 330
single word, 363
understanding, 360
vertical, 71
word spacing, 360
Justification dialog box, 360–363
Auto Leading field, 363
Glyph Scaling options, 362
illustrated, 360
Letter Spacing options, 361
opening, 360, 361, 362, 363
Single Word Justification menu, 363
Word Spacing options, 360

K

Keep Options dialog box, 353
kerning, 57
keyboard increments, 492
keyboard shortcuts, 501–526
Application menu (Mac), 502
assigning, 480
changing, 480
character styles, 335
context sensitivity, 501
default, 478
Edit menu (Mac), 502
Edit menu (Win), 514–515
File menu (Mac), 502
File menu (Win), 515
Help menu (Mac), 503
Help menu (Win), 515
insert special characters, 74
insert white space, 74
Japanese topography, 503, 515
Layout menu (Mac), 503
Layout menu (Win), 515
list, creating, 479
Macintosh, 502–514
magnification, 34
modifying, 478–480
object editing (Mac), 503–504
object editing (Win), 515–516
Object menu (Mac), 504
Object menu (Win), 516–517
palette menus (Mac), 505–508

palette menus (Win), 517–520
paragraph styles, 335
QuarkXPress set, 478
sets, 478
sets, creating, 479
sets, deleting, 480
Structure menu (Mac), 508
Structure menu (Win), 520
structure navigation (Mac), 508
structure navigation (Win), 520–521
Tables menu (Mac), 508–509
Tables menu (Win), 521
text and tables (Mac), 509–510
text and tables (Win), 521–523
text selection, 51
tools (Mac), 16, 511
tools (Win), 16, 523
Type menu (Mac), 511–512
Type menu (Win), 523–524
View menu (Mac), 512–513
View menu (Win), 524–525
views, navigation (Mac), 513–514
views, navigation (Win), 525–526
Window menu (Mac), 514
Window menu (Win), 526
Windows, 514–526
Keyboard Shortcuts dialog box, 478–480
Assign button, 480
Commands field, 480
Context menu, 480
Currently Assigned to area, 480
Delete Set button, 480
illustrated, 478
Product Area menu, 480
Save button, 480
Set menu, 478
knockout groups, 158

L

LAB colors
creating, 111
defined, 111
mixing, 114
uses, 114
language, setting, 60
Layer Options dialog box, 220
Color list, 268
illustrated, 268
Lock Guides option, 270
Lock Layer option, 268
opening, 266, 268
Show Guides option, 270
Show Layer option, 269
Suppress Text Wrap When Layer is Hidden option, 270
layers, 265–271
applying objects to, 271
creating, 266
creating, while pasting, 267
defined, 265
deleting, 267
dragging, 271
duplicating, 266
guides, controlling, 270
hiding, 269
highlight color, 268
locking, 268
merging, 271
moving objects between, 271
options, 268–270
renaming, 268
reordering, 271
showing, 269
text wrap, 270
unused, deleting, 267
working with, 271
Layers palette, 266–267
defined, 5
Delete Layer icon, 267
illustrated, 5
menu, 266
Delete All Unused Layers command, 267
Hide Others command, 269
Lock Others command, 268
Merge Layers command, 271
New Layer command, 266
Paste Remembers Layers command, 267
New Layer icon, 266
opening, 5
Toggle Lock space, 268
Toggle Visibility space, 269
See also palettes
Layout Adjustment dialog box, 250
Layout menu
Create Guides command, 30
First Page command, 234
Go Back command, 234
Go Forward command, 234
keyboard shortcuts (Mac), 503
keyboard shortcuts (Win), 515
Last Page command, 234
Layout Adjustment command, 250
Margins and Columns command, 23
Next Page command, 234
Next Spread command, 234
Previous Page command, 234
Previous Spread command, 234

Ruler Guides command, 31
Table of Contents command, 258
layouts, adjusting, 250
leading
attributes, 325
auto, 57,363
controls, 57
defined, **57**
letter spacing, 361
libraries, 273–278
adding items to, 274
adding pages to, 275
creating, 274
display, changing, 276
items, adding to documents, 275
items, deleting, 275
items, displaying, 277
items, information, 276
items, sorting, 278
items, storing, 274–275
searching, 277
swatch, 124–125
use strategies, 275
Library palette, 274–278
defined, **5**
illustrated, 5, 274
List View, 276
menu, 274
Add **All** Items on Page command, 275
Add Item command, 274
Delete **Item(s)** command, 275
Library Information command, 276
List View command, 276
Place **Item(s)** command, 275
Show Subset command, 277
Sort Items command, 278
Thumbnail View command, 276
opening, 5, 274
Thumbnail View, 276
See also palettes
lines
closing paths with, 169
creating, 78
diagonal, in cells, 312
drawing, 169
keeping, together, 353–354
measuring, 105
straight, creating, 169
lines (text)
ragged, balancing, 368
selecting, 50
spacing, 57–58
Lining figures, 372
linked graphics, 199–202
editing, 201
jumping to, 201
link information, 202
links, 199–201
relinking, **200**
sorting list of, 199
See also graphics
Link Information dialog box, 202
links
changing, 68
creating, 68
displaying, 68
indicators, 68
information, 202
information review, 445
missing, 199, 200
modified, 199, 200
reexamining, 199
updating, 201
See also text
Links palette, 199–202
defined, **5**
Embed icon, 203
icon commands, 201
icons, 199
illustrated, 5, 199
menu, 199
Edit Original command, 201
Embed File command, 203
Go To **Link** command, 201
Link Information command, 202
Relink command, 200
Sort commands, 199
Unembed File command, 203
Update Link command, 201
opening, 5, 199
page numbers, 199
See also palettes
loaded text cursor, 68, 238, 240
curved lines, 240
straight lines, 240
uses, 240
locked objects
creating, 107
moving, 250
See also objects
locking
guides, **31**
layers, 268
objects, 107
luminance, 114

M

Macintosh
insert special characters commands, 74
insert white space commands, 74
scripting requirements, 356
Macintosh keyboard shortcuts, 502–514
Application menu, 502
Edit menu, 502
File menu, 503
Help menu, 503
Japanese topography, 503
Layout menu, 503
object editing, 503–504
Object menu, 504
other, 504–505
palette menus, 505–508
Structure menu, 508
structure navigation, 508
Tables menu, 508–509
text and tables, 509–510
tools, 511
Type menu, 511–512
View menu, 512–513
views, navigation, 513–514
Window menu, 514
See also kevboard shortcuts
magnification
amounts, entering, 34
changing, 33–34
keyboard shortcuts, 34
list, viewing, 34
with View commands, 33
with Zoom tool, 37
margin guides, 28
margins, 18
colors, 494
fitting guides to, 30
indents, 63
optical, alignment, 358
setting, 21
Margins and Columns dialog box, 23
marquees
object selection, 79
zoom, 37
master frames
creating, 240
importing text into, 240
See also text kames
master-page elements
changing, 245
display, changing, 249
modifying, 248
overriding, 248
releasing, 248
separating, 249
separating items from, 248
stacking order, 249
master pages, 245–249
adding objects to, 245
applying, 247
base, 247
basis strategies, 246
converting pages to, 246
creating, 246
defined, 231
double-clicking, 245
dragging, 231
existing, 247
icon size, 230
local overrides, 231
number of, 249
reapplying, 249
uses, 245
working with, 245–249
See also pages
Measurement tool
angle measurement with, 105
defined, 104
illustrated, 104
measuring distances with, 104
moving measuring line with, 105
opening, 104
Opt/Alt key with, 105
repositioning points with, 105
measuring lines, 105
mechanicals, 17
merging
cells, 303
layers, 271
swatches, 121
metacharacters, finding/changing, 320
Microsoft Excel Import Options dialog box, 239, 287
Microsoft Word Import Options dialog box, 239, 287, 289
mitered joins, 145
Mixed Ink Group Options dialog box, 128
Mixed Ink Groups, 127–128
creating, 127
defined, 127
modifying, 128
mixed ink swatches, 126–129
creating, 111, 126
defined, 111, 126
deleting, from groups, 128
display, 127
modifying, 129
uses. 126

Modify Character Style dialog box, 335
Modify Paragraph Style dialog box, 335
mouse
events, 409
text selection with, 50
Move dialog box, 81
movie clips, 396–400
adding, 396,397
description, 397
display options, 400
empty, adding, 397
illustrated, 396
linking vs. embedding, 396
naming, 397
play options, 399
poster options, 399
URL connection, 398
Movie Options dialog box, 397–400
Description field, 397
Embed Movie in the PDF checkbox, 398
Floating Window checkbox, 400
illustrated, 397
Mode menu, 399
Name field, 397
opening, 397
Position menu, 400
Poster menu, 399
Show Controller During Play checkbox, 400
Size menu, 400
Source controls, 398
Specify URL option, 398
moving
anchor points, 172
bookmarks, 393
column guides, 29
container objects, 101
content objects, 101
control handles, 172
hyperlink destinations, 390
hyperlinks, 390
insertion points, 49
locked objects, 250
measuring lines, 105
nested elements, 194
objects, 80–81
objects between layers, 271
pages, 233
pasted-in content, 102
ruler guides, 31
swatches, 122
tab stops, 282
text on a path, 221
with Transform palette, 91
multimedia interactive PDF project, 414–415

N

Navigator palette, 39–40
choices, 40
defined, 5
elements, 39
illustrated, 5, 39
magnification, setting, 39
opening, 5, 39
Preview area, 40
view spread options, 39
zoom buttons, 39
Zoom slider, 39
See *abo* palettes
nested elements, 193–195
creating, 193
defined, 193
illustrated, 193
moving, 194
Select commands for, 195
selecting, 194
nested groups, 99
nested styles, 331, 344–347
applying, 347
defined, 344
End Nested Style Character, 346
functioning, 344
with Nested Styles command, 345
order, changing, 346
preparing, 344
repeating elements in, 346
use example, 344
See *also* styles
nesting bookmarks, 393
nesting palettes, 12
New Character Style dialog box, 333
New Color Swatch dialog box, 118
New Document dialog box, 18–19
advanced layout options, 19
basic layout options, 18
Bleed option, 19
Columns option, 18, 22
Facing Pages option, 18
Gutter option, 18, 22
Margins option, 18, 21
Master Text Frame checkbox, 240
Number of Pages option, 18
opening, 18
Orientation option, 18, 21
Page Size option, 18, 20
Slug option, 19
New Gradient Swatch dialog box, 132
New Hyperlink Destination dialog box, 381–383
Appearance options, 385, 388

Color menu, 388
Destination area, 386
Document list, 386
Highlight menu, 388
illustrated, 381
Name field, 385
Name menu, 386,387
opening, 381
Page Destination area, 382,386
Style menu, 388
Text Anchor destination, 383
Type menu, 388
URL Destination area, 383,387
Width menu, 388
New Hyperlink dialog box, **385–388**
New Master Page dialog box, 246
New Mixed Ink dialog box, 126
New Mixed Ink Group dialog box, 127
New Page Reference dialog box, 263
New Paragraph Style dialog box, 328–332
Advanced Character Formats, 329
Basic Character Formats, 329
Character Color, 331
Drop Caps and Nested Styles, 331,343,347
General Options, 329,332
Hyphenation, 330
Indents and Spacing, 329
Justification, 330
Keep Options, 330,354
opening, 328
OpenType Features, 331
Paragraph Rules, 330
Strikethrough Options, 331
Tabs, 330
Underline Options, 331
New Section dialog box, **251**
New Set dialog box, 479
New Stroke Style dialog box
Corners menu, 152
Dash controls, 151
Dotted controls, 152
illustrated, 149,150,151,152
opening, 149
Pattern Length menu, 151
Preview display, **150, 151**,152
Preview weight, 150,151,152
Stripe controls, 150
Type menu, 149,150,151,152
New Swatch dialog box, 124
New Tint Swatch dialog box, 131
The Non-Designer's Scan and Print ***Book,*** 417
Normal View Mode, 35
numbered lists, 63

O

Object menu
Arrange submenu
Bring Forward command, 95
Bring to Front command, 95
Send Backward command, 95
Send to Back command, 95
Clipping Path command, 205,207
Compound Paths submenu
Make command, 141,184
Release command, 141,163,184
Content submenu, 48
Corner Effects command, 156
Drop Shadow command, 161,162
Feather command, 162
Fitting submenu
Center Content to Frame command, 191
Fit Content Proportionally command, 191
Fit Content to Frame command, 191
Fit Frame to Content command, 191
Group command, 99,158,160
Image Color Settings command, 378
Interactive submenu
Button Options command, 403
Convert to Button command, 401
Movie Options command, 397
Sound Options command, 394,395
keyboard shortcuts (Mac), 504
keyboard shortcuts (Win), 516–517
Lock Position command, 107
Pathfinder submenu, 163
Reverse Path command, 173
Select submenu
Container command, 101,195
Content command, 100,101,195
Next Object in Group command, 100
Previous Object in Group command, 100
Text Frame Options, 220
Text Frame Options command, 69,220
Transform submenu
Move command, 81
Rotate command, 87
Scale command, 86
Shear command, 88
Ungroup command, 100
Unlock Position command, 107
objects
adding, to master pages, 245
aligning, 96–98
all, selecting, 79
applying, to layers, 271
applying strokes to, 142
arranging, 95

blending, isolating, 160
blend modes, 158–159
clicking, 79
container, moving, 101
container, selecting, 101
content, moving, 101
content, selecting, 101
Control palette for, 103
converting, to buttons, 401
copying, **81, 82**
creating, numerically, 77
cutting, 82
defaults, 166
distributing, 97–98
drop shadows, 161–162
duplicating, 82
editing keyboard shortcuts (Mac), 503–504
editing keyboard shortcuts (Win), 515–516
elliptical, 77
feathers, 162
flipping, 94
grid, creating, 83
grouping, 99
Info palette with, 106
information, 106
line, 78
locking, 107
marquee, dragging, **79**
movie clip, 396
moving, 80–81
moving, between layers, 271
moving, **up/down, 95**
moving, with Transform palette, 91
multiple, duplicating, 83
opacity, 157
pasted-in content, moving, **102**
pasted-in content, removing, **102**
pasted-in content, swapping, **102**
pasting, 82, 100
polygon, 78
rectangular, 77
replicating, 82–83
resizing, 84
resizing, with Transform palette, 91
rotating, 87–88
rotating, with Transform palette, **93, 94**
scaling, **84, 86–87**
scaling, with Transform palette, 92
selecting, 79
selecting, within groups, 99, 100
shearing, 88–89
shearing, with Transform palette, **93**
spacing, 98
stacking order, **95**
styling, 137–166
ungrouping, 100
working with, 75–108
Oldstyle figures, 372
opacity, 157
OpenType, 368–372
All Caps, 370
All Small Caps, 370
alternate glyphs, 369
automatic alternate characters, 368
Contextual Alternatives, 371
defined, 368
Discretionary Ligatures, 370
features, 370–372
Figure (number) Types, 372
fonts, 368
Fractions, 370
Ligatures, 370
Ordinals, 371
Small Caps, 370
Stylistic Alternatives, 371
Subscript/Inferior, 371
Superscript/Superior, 371
Swash, 371
OPI (Open Prepress Interface), 435
optical kerning, **57**
optical margin alignment, 358
orientation, document, **18, 21**
out-of-gamut colors, 114
output, 417–448
overflow symbol, 49
overprinting, 136

P

Package for GoLive dialog box, **473–475**
Copy to Images Sub-Folder area, **474**
Encoding menu, 473
General tab, 473
GIF options, 475
illustrated, **473**
Image conversion menu, 474
Images tab, **474**
JPEG options, 475
packaging, 257
defined, 447
for GoLive, 473–475
process, 447
padlock icon, 107
page hyperlinks
defined, 381
destination creation, 382
destination selection, 386
unnamed, creating, 386

See also hyperlinks
PageMaker files, opening, 44
page marks, 425
page numbers, 251–252
absolute, 252, 485
adjusting, 256
automatic, 251
continued to/from, 252
preferences, 485
section, 251–252, 485
pages
active, 233
adding, manually, 231
adding, to libraries, 275
adding, with Insert command, 232
blank, adding, 231–232
converting, to master pages, 246
deleting, 235
document, 231
dragging, outside spread, 237
duplicating, 235
facing, **18, 20**
icon size, 230
joining, into spread, 237
legal, in Page list, 234
master, 230, 231, 245–249
moving, 233
navigating, 233–235
navigating, with Layout menu, 234
navigating, with window page menu, 234
navigation controls, 234
number of, 18
pasteboard, 18
rearranging, 235
selecting, 235
separating, in spread, 237
size, **18, 20**
spreads, 236–237
targeting, 233
terminology, 231
tiling, 423–424
working on, 233
See also documents
Pages palette, 230–237
applying masters with, 247
defined, 6
display, controlling, 230
illustrated, 6, 230
menu
Allow Pages to Shuffle command, 235, 236, 237
Apply Master to Pages command, 247
Delete Pages command, 235
Detach Selection From Master command, 248, 249
Duplicate Spread command, 235
Insert Pages command, 232
Keep Spread Together command, 236
New Master command, 246
Override *All* Master Page Items command, 248, 249
Palette Options command, 230
Remove All Local Overrides command, 249
Save as Master command, 246
moving pages with, 233
New Page icon, 246
opening, 6, 230
resizing, 230
See also palettes
Palette Options dialog box, 40, 230
palettes, 2–13
Align, **2, 96–98**
Attributes, 2, 136, 418
Book, **253–257**
Bookmarks, 2, 391–393
Character, **2, 53**
Character Styles, 3, 333, 339
choosing, 2–9
dosing, **10**
Color, 3, 112–115
Control, **3, 72,** 103, 313–314
displaying, **5**
display states, **11**
docking, 13
expanding, 11
Flattener Preview, 3, 439–440
Glyphs, **3, 67, 369**
Gradient, 4, 134–135
hiding, **10**
Hyperlinks, 4, 381–390
Index, 4, 263–264
Info, 4, 106
Layers, 5, 266–267
Library, 5, 274–278
Links, 5, 199–202
menu keyboard shortcuts (Mac), 505–508
menu keyboard shortcuts (Win), 517–520
menus, displaying, **10**
Navigator, **5, 39–40**
nesting, **12**
new, 2
opening, **10**
options, revealing, 11
Pages, 6, 230–237
Paragraph, **6, 61–63, 224**
Paragraph Styles, 6, 328, 339
Pathfinder, 6, 163
rows, small, **12**
Script Label, **7**

Scripts, 7,354
Separations Preview, 7,429–431
shrinking, 11
side tab collapselexpand, 13
side tab creation, **12**
States, 404–408
Story, 7,358
Stroke, 7,144–148
Swatches, 8,116–123
Tables, 8,294,313
Tabs, 8,281–284
Tags, 8
Text Wrap, 9,216–220
third-party, 4
Transform, **9, 90–94**
Transparency, 9,157–160
Trap Presets, 9
undocking, 13
unnesting, 12
working with, 10–13
Pantone library, 125
paper separations, 427
Paragraph palette, 61–63
Alignment buttons, 62
Align to Baseline Grid buttons, 367
Balance Ragged Lines option, 368
defined, 6
Drop Cap controls, 65
First Line Only from the Align to Grid option, 367
Hyphenate checkbox, 66,364
illustrated, **6, 61**
Margin Indents, 63
menu, 61
Balance Ragged Lines command, 368
Drop Caps and Nested Styles command, 345
Hyphenation command, 364
Justificationcommand, 360,361,362,363
Keep Options command, 353
Only Align First Line to Grid option command, 367
Paragraph Rules command, 224
opening, **6, 61**
options, 61
Space controls, 65
See also palettes
paragraph rules, 224–227
applying, 224
color, 225
defined, 224
gap **color/tint,** 225
offset, 226
paragraph styles, 330
reverse text with, 227
styling, 225
tint, 225
uses, 224
weight, 225
width, 226
See also text effects
Paragraph Rules dialog box, 224–227
Color list, 225
Gap Color list, 225
Gap Tint control, 225
illustrated, 224,227
Left/Right Indent fields, 226
opening, 224
Preview checkbox, 227
Rule Above option, 224
Rule Below option, 224,227
Rule On checkbox, 224
sample settings, 227
Tint control, 225
Type list, 225
Weight control, 225
Width list, 226
paragraphs
alignment, 62
attributes, applying, 61
attributes, sampling, 349
composition, 359
drop caps, 65
effects, setting, 65–66
hanging bullets, 63
keep options, 353
margin indents, 63
numbered lists, 63
selecting, 50
settings with Control palette, 72
spaces between, adding, 65
spacing limit, 71
Paragraph Style Options dialog box, 339
paragraph styles
applying, 337
applying nested styles in, **347**
automatic drop cap, **343**
basis, 329
character colors, 33**1**
character formats, 329
defining, by example, 332
defining, manually, 328
drop caps, 331
hyphenation, 330
indents, 329
justification, 330
keyboard shortcuts, **335**
nested, **331**
next, setting, 332
overriding, 338

rules, 330
spacing, 329
strikethrough options, 331
tabs, 330
underline options, 331
See also character styles; styles
Paragraph Styles palette
Based On menu, 329,334
defined, 6
disk icon, 336
illustrated,6,328
menu
Delete Styles command, 339
Duplicate Style command, 334
New Style command, 328
Redefine Style command, 339
Next Style menu, 328,332
opening, 6,328
Shortcut field, 328,335
See also palettes
pasteboard,18
controls,36
options, 494
vertical offset,36
viewing,33
pasted-in content objects
Control palette with, 103
moving, 102
removing, 102
swapping, 102
See also objects
Paste In Place command, 82
pasting
objects, 82
table cells, 296
text, 52
See also copying
Pathfinder commands, 163
Pathfinder palette, 163
defined, 6
illustrated, 6
opening, 6,163
See also palettes
paths
adding points to, 174
clipping, 204–207
closing, with smooth curve, 170
closing, with straight line, 169
deleting, 179
deleting points from, 174
deleting segments in, 175
direction, changing, 173
editing, with Pencil tool, 176
elements of, 168
importing, as frames, 186
modifymg, 172–173
smoothing, 178
splitting, 173
text conversion to, 185
Path Type Options dialog box, 222–223
Align menu, 223
Clip checkbox, 222
Effect menu, 222
illustrated,222
opening, 222
To Path menu, 223
Path Type tool, 220
PDF Export Presets dialog box, 462–463
Delete button, 463
Edit button, 463
illustrated,462
Load button, 463
New button, 462
opening, 462
Save button, 463
PDF files, 449
adding movies to, 398
change permissions, 461
color controls, 459
colorlgrayscale compression,457
colorlgrayscale downsampling,456
compression options, 456–458
creating, 451–452
exporting, 451–463
exporting book files to, 257
export options, 451–452
fonts, embedding, 459
fonts, subsetting, 458
general options, 454
import options, 188
inclusion control, 454
interactive, 414–415
monochrome bitmap downsampling,457
monochrome bitmap resolution,458
monochrome image compression,458
multimedia embedding options, 455
for onscreen viewing, 455
for output, 455
page specification, 453
password, 460
PDF/X profile, 459
printing permission, 460
security limits, 461
security options, 460–461
settings, saving, 462
version and standard, 453
PDF presets, 462–463
applying, 462

creating, 462
custom, 463
defined, 462
deleting, 463
editing, 463
exporting, 463
importing, 463
saving current settings as, 462
Pencil tool, 176–177
double-clicking, 177
dragging, 176
drawing with, 176
editing paths with, 176
illustrated, 176
Opt/Alt key with, 176
preferences, 177
Pencil Tool Preferences dialog box, 177
Pen tool, 167, 168–171
clicking, 169
defined, 168
illustrated, 169
Opt/Alt key with, 170
plus sign, 219
rules, 171
Shift key with, 169
Photoshop
clipping path creation, 204
transparency and, 208
pixel images, import options, 187
Place dialog box, 182
Import options, 238
opening, 238
placeholder text, 244
Place PDF dialog box, 188
plug-ins
configuring, 500
default sets, 500
information, 500
information review, 446
set modification, 500
set selection, 500
points. See anchor points
point sizes
changing, 54
defined, 54
selecting, 43
polygon frames, 47, 78
Polygon Settings dialog box, 47, 78
Polygon tool, 47
Postscript files, 443
precision eyedropper, 165
Preferences dialog box
categories, 481
Composition, 482, 490–491
Dictionary, 483, 495–496
Display Performance, 484, 497–498
File Handling, 484, 499
General, 481, 485, 487
Grids, 483, 493
Guides & Pasteboard, 28, 483, 494
opening, 481
Spelling, 484, 497
Story Editor Display, 484
Text, 482, 488–489
Units & Increments, 482, 492
Update, 484, 500
preflight, 257
Preflight dialog box, 444–446
categories, 444
Colors and Links category, 446
External Plug-ins category, 446
Fonts category, 445
illustrated, 444
Links and Images category, 445
opening, 444
Package button, 444
Print Settings category, 446
Report button, 444
Summary area, 444
Preview Mode, 35
previews
cell, 307
default appearance, 210
EPS files, 465
flattener presets, 439–440
gradient, 135
individual image, 211
overprinting, 136
saved file, 499
separations, 429
Print dialog box
Advanced category, 420, 435
All Printer's Marks option, 425
Angle field, 428
Bleed controls, 426
Color Management category, 420
Color menu, 427
Copies area, 421
Download menu, 434
Flip menu, 427
Frequency field, 428
General category, 419
Graphics category, 420, 434
illustrated, 418
Include Slug Area option, 426
Ink Manager button, 432
Marks and Bleeds category, 419, 425–426
Marks settings, 425

opening, 418
OPI Image Replacement options, 435
Options area, 421
Orientation buttons, 422
Output category, 419, 427–428, 432–433
Page Position menu, 422
Pages area, 421
Paper Size menu, 422
PPD menu, 443
Preset menu, 435
Printer list, 421
Printer menu, 443
Printer Preset menu, 441
Save Preset button, 440
Scale controls, 422
Screening menu, 428
Send Data menu, 434
Setup category, 419, 422, 423–424
Summary area, 442
Summary category, 420
Thumbnails menu, 422
Tile menu, 423
Auto command, 423
Auto Justified command, 423
Manual command, 424
Trapping menu, 428
Use Document Bleed Setup option, 426
Printer Preset dialog box, 441
printers, choosing, 421
printer's marks, 425
printing
bleeds, 426
books, 257
color options, 427
to disk, **443**
documents, 418
flattener settings, 435
font information, 434
graphics options, 434
image data, 434
OPI controls, 435
options, setting, 421
output controls, 427–428
packaging for, 447
paper size/orientation, 422
PDF permissions, 460
preferences, 486
preflight, 444–446
printer's marks, 425
screen settings, 428
separations, 429–433
settings information review, 446
setup controls, 422
summary, 442
tiling pages and, 423–424
trapping and, 428
Printing Instructions dialog box, **447**
print presets, 440–442
applying, 441
defining, 441
deleting, **441**
exporting, 441
importing, 442
saving, 440
process colors
benefits, 119
converting, to spot colors, 432
defined, 119
in gradients, 134
selecting, 118
tints, 130
See also colors
profiles, 378
prog proofs, 429
projecting caps, 145
Proportional figures, 372
punctuation spaces, 73

Q

QuarkXPress
files, opening, 44
keyboard shortcuts set, 478
quotations, 495

R

ragged lines, 368
Real World Color Management, 373
recovering files, 44
Rectangle dialog box, **48, 77**
Rectangle Frame tool, 77
Rectangle tool, 48
rectangular frames, **48, 77**
redo, **43**
registration color, 117
repeating elements
searching for, **344**
setting, in nested style, 346
See also nested styles
resizing
with bounding box handles, 84
graphic frames, 191
graphics, 191
objects, 84
scaling vs., 84
with Transform palette, 91
reversed text, 227
RGB colors

creating, 110
defined, 110
mixing, 113
uses, 113
working space, 375
See also colors
right tab character, 280
RIP (raster image processing), 427
Rollover state, 404
Rotate dialog box, 87
rotating
with Free Transform tool, 89
numerically, 88
with Rotate command, 87
with Rotation tool, 87, 88
with Transform palette, 93
with Transform palette menu, 94
visually, 87
Rotation tool
illustrated, 87
numerical rotation with, 88
Opt/Alt key with, 87, 88
Shift key with, 87
visual rotation with, 87
round caps, 145
round joins, 145
rows
adding, while dragging, 295
alternate repeating strokes, 309
automatically distributing, 298
creating, with guides, 30
deleting, 295
footer, 293
going to, 290
header, 293
height, changing numerically, 297
height, changing visually, 296
inserting, 294
keep options, 298
number of, 285
selecting, 292
working with, 293–298
See also columns; tables
ruler guides
appearance, changing, 31
colors, 31
creating, 29
defined, 28
deleting, 31
dragging, 29, 31
illustrated, 28
moving, 31
moving with layout, 250
repositioning, 30
Ruler Guides dialog box, 31

S

Save As dialog box, 42
save commands, 43
Save Preset dialog box, 440, 462
Save Style dialog box, 258
Save Workspace dialog box, 14
Scale dialog box, 86
Scale tool, 86–87
illustrated, 86
numerical scaling with, 87
Opt/Alt key with, 86, 87
Shift key with, 86
visual scaling with, 86
scaling
with Free Transform tool, 89
glyph, 362
numerically, with Scale tool, 87
objects, 84, 86–87
objects with content, 92
proportionally, with Transform palette, 92
with Scale command, 86
with Scale tool, 86, 87
with Transform palette, 92
visually, with Scale tool, 86
Scissors tool, 180
illustrated, 173
using, 173
Script Label palette, 7
scripts, 354–356
double-clicking, 354
favorite, 354
list (InDesign), 355
requirements, 356
running, 354
Scripts palette
defined, 7
illustrated, 7, 354
opening, 7, 354
See also palettes
sections
creating, 251
defined, 251
marker characters, 252
Security PDF options, 460–461
Changed Allowed menu, 461
defined, 452
Document Open Password area, 460
illustrated, 452
Permissions area, 460
Printing Allowed menu, 460
security limits, 461

See also Export PDF dialog box
segments
curved, 170
defined, 168
deleting, 175
selecting
all objects, 79
behaviors, 409
columns, 291
container objects, **101**
content objects, **101**
fonts, 54
frames, 108
graphic frames, 108, 183
with keyboard shortcuts, 51
lines, 50
non-adjacent swatches, 120
objects, **79**
pages, 235
paragraphs, 50
rows, 292
tables, 292
table text, 291
text, 50–51
text frames, 108
unassigned frames, 108
words, 50
Selection tool, 189, 190
clicking, 79
Cmd/Ctrl key with, **79, 84, 169**
dragging, **79, 80, 84**
Opt/Alt key with, 81
shift-clicking, 79
Shift key with, 84
semi-autoflow cursor, 242
separations, 427
defined, 429
ink limit, 431
Ink Manager and, 432–433
inks, viewing, **431**
paper, 427
preview, turning on, 429
viewing, 429–431
See also colors
Separations Preview palette, 429–431
defined, 6
illustrated, 6, 429
opening, 6, 429
panel menu icon, 431
plate inks, viewing, 431
plate settings, 430
Show/Hide icons, 429
View menu, 429, 430
See also palettes
separator characters, 261
Shear dialog box, 88
shearing
axis, 88
numerically, 89
objects, 88–89
objects and content, **93**
with Shear command, 88
with Shear tool, **88, 89**
with Transform palette, 93
visually, 88
Shear tool
illustrated, 88
numerical shearing with, 89
Opt/Alt key with, 89
visual shearing with, 88
side tabs
collapsing, 13
creating, 12
defined, 12
expanding, 13
See also palettes
single word justification, 363
skewing, **59**
slug area, 19
color, 494
setting, 426
slug guides, 28
Slug Mode, 35
smooth curve points, 171, 175
smooth curves, 170
Smooth tool, 178
Smooth Tool Preferences dialog box, 178
sorting
library entries, 278
linked graphic list, 199
Sound Options dialog box, **394–395**
sounds, **394–395**
adding, **394**
empty clips, adding, **394**
options, 395
requirements, 394
spacing
characters, 57–58
inset, 70
letter, 361
lines, 57–58
for object distribution, 98
objects, 98
paragraph, **65, 71**
paragraph styles, 329
space types, 73
table, 299
word, 360

special characters
insert commands, **74**
inserting, 73
space, 73
specialtyframes, 184–186
spell check, 316–318
dictionary, **318**
error correction, 317
limitations, 317
suggested corrections, 317
using, **316**
words, ignoring, **317**
Spelling preferences, 497
Default View Settings controls, **497**
defined, 484
Find controls, 497
illustrated, 484
spine, 27
spot colors
benefits, 119
converting, to process colors, 432
creating, **111**
defined, **111**
in gradients, 134
selecting, 118
tints, 130
See also colors
spreads, 236–237
island, 236
joining pages into, 237
keeping together, 236
separating, 237
See also facing pages
star frames, 47
State Options dialog box, 405
States palette, 404–408
Appearance menu, 408
illustrated, 404
menu
Delete Content from State command, 407
Delete State command, 404
New State command, 404
Place Content into State command, 406
State Options command, 405
opening, 404
Step and Repeat dialog box, 83
Story Editor, 326–337
cursor display, 327
left side, 326
opening, 326
preferences, 327, 484
right side, 326
text display, 326, 327
Story palette
defined, 7
illustrated, 7, 358
opening, 7, 358
Optical Margin Alignment option, 358
See also palettes
Strikethrough effect
application options, 325
customizing, 56
defined, *55*
illustrated, 55
paragraph options, **331**
Strikethrough Options dialog box, 56
stripe stroke style, 150
strippers, 181
Stroke palette, **144–148**
Align Stroke controls, 146
Cap icons, 145
Corners menu, 148
Dashed settings, 148
defined, **7**
End menu, 156
Gap Color menu, 147
Gap Tint controls, 147
illustrated, 7, 144
Join icons, 145
Miter Limit field, 145
opening, 7, 144
Start menu, 156
Stroke Styles command, 149, 153
Stroke Type menu, 147
Weight controls, **144**
See also palettes
strokes, 142–155
alignment, 146
alternate repeating, for columns, 310
alternate repeating, for rows, 309
applying, to objects, 142
applying, to text, 143
applying, to text in frame, 143
applying colors to, 115
applying stroke styles to, 147
arrowheads, 156
cap settings, 145
cell, customizing, 307
dashed, creating, 148
defaults, 166
defined, 142
deleting, 153
dragging, 142
end shapes, 156
fill settings swap, 142
gap color, 147, 155
gradient, applying, 143
join settings, 145

saving, 153
setting, to overprint, 136
transferring, 153
weight, 144, 155
white, 155
See also fills
stroke styles
applying, to strokes, 147
benefits, 155
creating, 149–155
dashed, 151
deleting, 153
dotted, 152
editing, 152
naming, 149
saving, 153
stripe controls, 150
transferring, 153
uses, 154–155
Stroke Styles dialog box
Delete button, 153
illustrated, 149, 153
Load button, 153
New button, 149
opening, 149
Save button, 153
Structure menu
keyboard shortcuts (Mac), 508
keyboard shortcuts (Win), 520
structure navigation
keyboard shortcuts (Mac), 508
keyboard shortcuts (Win), 520–521
styles, 328–347
applying, 337
basing, **334**
character, 333
defining, 328–336
disk icon, 336
drop cap, 342–343
duplicating, 334
guidelines, **335**
importing, 336
nested, 331, 344–347
overriding, 338
paragraph, 328–332
stroke, 149–155
as tags, 340–341
TOC entry, 261
transferring, 336
Subset dialog box, 277
SVG files, 469–471
area/pages conversion, 469
CSS properties, 471
decimal precision, 471
encoding, 471
exporting, 469–471
fonts, 470
images, 470
SVG Compressed files vs., 468
SVG Options dialog box, 469–471
CSS Properties, 471
Decimal field, 471
Encoding menu, 471
Fonts Subnetting menu, 470
illustrated, 469
Image Location controls, 470
More Options button, 471
opening, 469
Pages options, 469
swatches. 116–123
applying, 120
defined, **116**
defining, **118**
deleting, 120
dragging, **122**
duplicating, 122
gradient, 132–135
importing, 122, 125
merging, 121
mixed ink, 126–129
modifymg, **119**
moving, 122
naming, 118
non-adjacent, selecting, 120
tint, 130–131
types of, 116
unused, deleting, **121**
See also colors
Swatches palette, 116–123
adding colors to, 117
Container icons, 138
defined, 8
Delete Swatch icon, 120, 121
dragging colors to, 117
Fill icon, 138
icons, 119
illustrated, 8, 116
menu, **116**
Add Unnamed Colors command, 123
Delete Swatch command, 120, 121
Duplicate Swatch command, 122
illustrated, **121**
Load Swatches command, 122
Merge Swatches command, 121
New Color Swatch command, 118
New Gradient Swatch command, 132
New Mixed Ink Group command, 127
New Mixed Ink Swatch command, 126

New Tint Swatch command, 131
Select All Unused command, 121
Swatch Options command, 128,133
New Swatch icon, 122,130,135
None icon, 141
opening, 8,116
Stroke icon, 142,143
Text icons, 139
Tint field, 130
working with, 116
See also palettes
swatch libraries, 124–125
adding colors from, 124
samples, 124
selecting, 118,124
third-party, 125
using, 124–125
Swatch Options dialog box, 119,129
Synchronize Options dialog box, 255
System libraries, 125

T

tab leaders, 284
adding, 284
defined, 284
selecting characters in, 284
Table menu
Cell Options submenu
Diagonal Lines command, 312
Rows and Columns command, 297,298
Strokes and Fills command, 307,308
Text command, 302,304
Convert Rows submenu, 301
Convert Table to Text command, 289
Convert Text to Table command, 286
Delete submenu, 295
Distribute Columns Evenly command, 298
Distribute Rows Evenly command, 298
Go to Row command, 290
Insert submenu, 294
Insert Table command, 285
keyboard shortcuts (Mac), 508–509
keyboard shortcuts (Win), 521
Merge Cells command, 303
Select submenu, 292
Split Cells Horizontally command, 303
Split Cells Vertically command, 303
Table Options submenu
Alternating Column Strokes command, 310
Alternating Fills command, 311
Alternating Row Strokes command, 309
Headers and Footers command, 300
Table Setup command, 293,299,308
Unmerge Cells command, 303
Table of Contents dialog box
Add button, 259
Create PDF Bookmarks option, 262
Entry Style menu, 260
illustrated, 258
Include Book Documents option, 262
Include Paragraph Styles list, 259
Include Text on Hidden Layers option, 262
More Options button, 260
opening, 258
Page Number menu, 261
Replace Existing Table of Contents option, 262
Run-in option, 262
Save Style button, 258
Sort Entries in Alphabetical Order option, 262
Style menu, 259
Style options area, 261
Title and Listing controls, 258
Title field, 259
table of contents (TOC), 258–262
alphabetizing, 262
automatic, benefits, 259
controls, 260
document preparation for, 258
entries, advanced style options, 261
entries, formatting, 260
entries, indenting, 262
entries, style definition, 258
generating, 258
listings selection, 259
of non-existing items, 262
options, 262
separator character, 261
title, 259
uses, 261
Table Options dialog box
Alternating controls, 309, 310, 311
Alternating Pattern menu, 309, 310, 311
Column Strokes tab, 310
Fills tab, 311
Headers and Footers area, 300
Preserve Local Formatting option, 306
Row Strokes tab, 309
Table Setup category, 306
Table palette, 313
defined, 8
features, 313
illustrated, 8,313
menu
Insert Column command, 294
Insert Row command, 294
Table Options command, 311
opening, 8,313

See *also* palettes
tables, 285–314
adding images to, 302
borders, 306
in cells, 289
converting, to text, 289
creating, in text frame, 285
deleting, 295
flowing, between frames, 299
footers, 285, 300–301
headers, 285, 300–301
height, 285
importing, 287
inserting tabs in, 290
keyboard shortcuts (Mac), 509–510
keyboard shortcuts (Win), 521–523
navigating through, 290
selecting, 292
spacing around, 299
text conversion into, 286
uses, 284
width, 285
See *also* cells; columns; rows
Table Setup dialog box
Drawing menu, 308
illustrated, 293
opening, 293
Table Border category, 306
Table Dimensions area, 293
Table Spacing controls, 299
tabs
defined, 279
inserting, 280
inserting, in cells, 290
inserting, in tables, 290
paragraph styles, 330
right, 280
uses, 284
Tabs palette, 281–284
alignment icons, 281
Decimal Tab icon, 283
defined, 8
illustrated, 8, 281
Leader field, 284
menu
Clear All command, 283
Repeat Tab command, 282
opening, 8, 281
ruler area, 281
See *also* palettes
tab stops
clearing, 283
defined, 281
dragging, 283
moving, 282
removing, 283
repeating, 282
setting, 281
settings, changing, 282
Tabular figures, 372
Tag for En Dash character style, 340, 341
tagged text
creating, 350–351
Export Options dialog box for, 350
importing, 351
import options, setting, 351
tags, 350–351
export, 350
styles as, 340–341
types of, 350
Tags palette, 8
temporary folders, 499
text, 45–74
applying fills to, 139
applying strokes to, 143
attributes, sampling, 349
automating, 315–356
baseline shift, 58
case, changing, 316
Control palette and; 72
converting, to frames, 185
converting, to tables, 286
copying, 52
distortions, 59
duplicating, 52
electronic styles, 55–56
embedded files, 489
exporting, 472
Eyedropper tool for, 348–349
finding/changing, 319–320
flowing, 240–244
fonts, 54
highlighting, 139
horizontal scaling, 59
importing, 238–239
importing, into new frame, 240
information, 106
inserting tabs in, 280
insertion point, 49
kerning, 57
keyboard shortcuts (Mac), 509–510
keyboard shortcuts (Win), 521–523
leading, 57
lines, selecting, 50
linked files, 489
links, 68
links, changing, 68
links, displaying, 68

overflow symbol, 49
paragraphs, selecting, 50
pasting, 52
paths, 185
placeholder, 244
point size, 54
reversed, 227
selecting, 50–51
selecting, in table cell, 291
setting preferences, 488
skewing, **59**
special characters, **73**
strikethrough, **55, 56**
styling, 55–56
tagged, 350–351
threads, 68
tracking, 58
typing, 49
underline, **55, 56**
utilities, 66–67
vertical scaling, 59
words, selecting, 50
text anchors
defined, 381
destination creation, 383
destination selection, 386
editing, 384
See also hyperlinks
text effects, 215–227
paragraph rules, 224–227
text on a path, 220–223
text wrap, 216–220
Text Frame Options dialog box, 69–71, 220
Column settings, 69
First Baseline Offset menu, 70
Fixed Column Width option, 69
Ignore Text Wrap checkbox, 220
illustrated, 69
Inset Spacing settings, 70
opening, 69
Paragraph Spacing Limit option, 71
Vertical JustificationAlign menu, 71
text frames
adjusting tables within, 299
columns, creating, 69
controls, setting, 69–71
creating, **46–48, 76**
creating tables in, 285
drawing tips, 48
elliptical, 46
first baseline, 70
height/width, 48
importing text into, 240
inset, 70
linking text between, 68
master, creating, 240
overflow symbol, 49
polygon, 47
rectangular, 48
selecting, 108
sizing, numerically, 48
star, 47
with Type tool, 46
unassigned, **47**
unassigned, converting, 48
vertical justification, 71
See also frames
Text Import Options dialog box, 239
text on a path, 220–223
effects, 222
effect settings, 222
flipping, 221
outside, 221
positioning, 221
vertical alignment, 223
Text preferences, 488–489
Character Settings area, 488
Create Links When Placing Text and Spreadsheet Files checkbox, 489
defined, 482
illustrated, 482
Input Method Options area, 489
Type Options area, 488
See also Preferences dialog box
Text tool, 296, 402
Text Wrap palette, 216–220
Contour Options Type menu, 218
defined, 9
illustrated, 9, 216
Include Inside Edges option, 218
Invert option, 216
Offset controls, 216
opening, 9, 216
text wrap buttons, 216
See also palettes
text wraps, 216–220
Bounding Box, 216, 217
changing shape of, 219
contour options, 218
creating, 219
defined, 216
deleting points from, 219
for hidden layers, 270
ignoring, 220
inside holes, 218
invert, 216
invisible objects, **219**
Jump Object, 216, 217

Jump to Next Column, 216,217
No Wrap, 216,217
Object Shape, 216,217
offset, 216
options, 491
regular, 216
See also text effects
thin spaces, 73
third-party palettes, **4**
tiling, 423–424
auto justified, 423
automatic, 423
defined, 423
manual, 424
See also printing
tints, 130–131
with Color palette, 130
creating, 111, 130
defined, **111**
modifying, 131
options, 131
paragraph rule, 225
percentage, 130
process color, 130
spot color, 130
storing, 131
See also colors
Toolbox
arrangements, 486
Container icons, 138
Default icons, 166
defined, **15**
display, 486
Fill icons, 120, 138
fly-out panels, 15
Gradient icon, 139
illustrated, 15
None icon, 141
Stroke icon, 120, 142, 143
Swap Fill icon, 142
Text icons, 139
view mode icons, 35
tools
Add Anchor Point, 174, 180
Button, 401
Convert Direction Point, 175
Delete Anchor Point, 174, 180
Direct Selection, **79, 99, 172**
Ellipse, 46
Ellipse Frame, 77
Erase, 179, 180
Eyedropper, 135, 164–165, 348–349
Free Transform, 89
Gradient, 140
Group Selection, **85, 99, 194**
Hand, 38
keyboard shortcuts (Mac), 16, 511
keyboard shortcuts (Win), 16, 523
Line, 78
Measurement, 104–105
Path Type, 221
Pen, 168–171
Pencil, 176–177
Polygon, 47
Polygon Frame, 78
Rectangle, 48
Rectangle Frame, 77
related, opening, 16
Rotation, 87–88
Scale, 86–87
Scissors, 173, 180
selecting, **15**
Selection, 79
Shear, 88–89
Smooth, 178
Text, 296
Transform, 85–89
Type, 46
Zoom, 37
See also Toolbox
tool tips, 16
defined. 485
preferences, 485
topographer's quotes, 488
Toyo library, 125
tracking, 58
Transform palette, 90–94
defined, **9, 90**
illustrated, **9, 90**
Link icon, 92
menu, 94
Reset Scaling to 100% command, 144
Show Content Offset command, 192
moving objects with, 91
opening, **9, 90**
reference point, setting, 90
Reference point controls, 90
resizing with, 91
Rotate field, 93
rotating with, 93
Scale width and height fields, 92
scaling with, 92
Shear field, 93
shearing with, **93**
W and H fields, 91
X and Y fields, 91, 192
See also palettes
Transform tools, 85–89

defined, 85
effects, controlling, 85
Free Transform, 89
Rotation, 87–88
Scale, 86–87
Shear, 88–89
transformation point, 85
transparency
in Illustrator files, 208
in Photoshop files, 208
resources, 439
transparency effects, 157–162
applying, 162
blend modes, 158–159
drop shadows, 161–162
feathers, 162
opacity, 157
Transparency Flattener Preset Options dialog box, 436
Transparency Flattener Presets dialog box, 436–437
Delete button, 437
Edit button, 437
illustrated, 436
Load button, 437
New button, 436
opening, 436, 439
Save button, **437**
Transparency palette, 157–160
Blend Mode menu, 158
defined, 9
illustrated, 9, 157
Isolate Blending option, 160
Knockout Group option, 158
Opacity slider, 157
opening, 9, 157
Show Transparency Options command, 158
See *abo* palettes
trapping, 428
Trap Presets palette, 9
Trumatch library, 125
typefaces. **See** fonts
Type menu
Change Case command, 316
Character command, **2, 53, 365**
Character Styles command, 3, 333
Create Outlines command, 185
Fill with Placeholder Text command, 244
Find Font command, 352
Font command, 54
Insert Break Character command, 244
Insert Glyphs command, **3, 67, 369**
Insert Special Character submenu, **73**
Discretionary Hyphen command, 365
End Nested Style Here command, 346
Indent to Here command, 64
Section Name command, 252
Tab Character command, 290
Insert White Space command, 73
keyboard shortcuts (Mac), 511–512
keyboard shortcuts (Win), 523–524
Paragraph command, 61, 359, 360, 361, 362
Paragraph Styles command, 328, 332
Show Hidden Characters command, 66, 280, 346
Sue command, **54**
Story command, 358
Tabs command, 281
Type on a Path Options command, 222
Type tool, 46
typography controls, 357–372

U

unassigned frames, **47**
converting, 48
defined, **47, 76**
selecting, 108
uses, 76
See *also* frames; text frames
Underline effect
application options, 325
customizing, 56
defined, **55**
as highlights, 56
illustrated, **55**
paragraph options, 331
Underline Options dialog box, 56
undo, **43**
unembedding images, 203
Units & Increments dialog box
Custom menu, 492
defined, 482
illustrated, 482
Keyboard Increments field, 492
opening, **26, 27**
Origin menu, 492
Ruler Units **Horizontal/Vertical** setting, 26
Ruler Units menu, 492
Ruler Units Origin setting, 27
unnamed colors, **116, 123**
unnamed gradients, **134–135**
avoiding, 134
creating, 134
storing, 135
See *also* gradients
Updates preferences, 500
Check Updates menu, 500
defined, 484
illustrated, 484
Up state, 404

URLs
defined, 381
destination creation, 383
destination selection, 387
movie connection, 398
unnamed, creating, 387

V

Version Cue software, 499
vertical offset, 36
vertical scaling, 59
View menu
Display Master Items command, 249
Fit Page In Window command, 33
Fit Spread In Window command, 33
Hide Baseline Grid command, 32
Hide Document Grid command, 32
Hide Guides command, 28
Hide Rulers command, 26
keyboard shortcuts (Mac), 512–513
keyboard shortcuts (Win), 524–525
Lock Guides command, 31
Overprint Preview command, 136
Show Baseline Grid command, 32
Show Document Grid command, 32
Show Guides command, 28
Show Rulers command, 26
Show Text Threads command, 68
Snap to Document Grid command, 32
Snap to Guides command, 29
Zoom In command, **33**
Zoom Out command, 33
view modes, 35
views, navigation
keyboard shortcuts (Mac), 513–514
keyboard shortcuts (Win), 525–526
Visual Basic, 356

W

warning dialog boxes, resetting, 487
Web library, 125
white point, 377
white space characters
defined, 73
inserting, 73
insert keyboard shortcuts, 74
types of, 73
wildcard characters, 321
Window menu
Align command, **2, 96**
Arrange submenu
Bring All To Front command, 41
New Window command, 41
Tile command, 41
Attributes command, 2, 136
Bookmarks command, **2**
Color command, **3, 112**
Control command, 3, 313
Gradients command, 4, 134
Info command, 4, 104
Interactive submenu
Bookmark command, 391
Hyperlinks command, **4, 381**
keyboard shortcuts (Mac), 514
keyboard shortcuts (Win), 526
Layers command, 5, 266
Links command, 5, 199–202
Navigator command, **5, 39**
Output Preview submenu
Flattener command, 3, 439
Separations command, 7, 429
Pages command, 6, 230
Pathfinder command, 6
Scripting submenu
Script Label command, 7
Scripts command, 7, 354
Stroke command, 7, 144
Swatches command, **8, 116**
Tags command, 8
Transform command, **9, 90**
Transparency command, 9, 157
Trap Presets command, 9
Type submenu
Character command, **2, 53**
Character Styles command, 3, 333
Insert Glyphs command, **3**
Paragraph command, **6, 61**
Paragraph Styles command, 6, 328
Story command, 7, 358
Type & Tables submenu
Index command, 4, 263
Table command, 8, 313
Tabs command, 8, 281
Text Wrap command, 9, 216
Windows
insert special characters commands, **74**
insert white space commands, **74**
scripting requirements, 356
Windows keyboard shortcuts, 514–526
Edit menu, 514–515
File menu, 515
Help menu, 515
Japanese topography, 515
Layout menu, 515
object editing, 515–516
Object menu, 516–517
other, 517

palette menus, 517–520
Structure menu, 520
structure navigation, 520–521
Tables menu, 521
text and tables, 521–523
tools, 523
Type menu, 523–524
View menu, 524–525
views, navigation, 525–526
Window menu, 526
See also keyboard shortcuts
Word
importing tables from, 287
import options, 239
tables, formatting, 289
word spacing, 360
workspaces, 14

Z

zero point, 27
Zoom tool, 37

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