

Basics of Adobe InDesign

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InDesign is a layout and design program for print documents. It is Adobe's replacement for Pagemaker and is tightly integrated with Adobe Photoshop, Adobe Illustrator and Adobe Acrobat. You can produce PDF documents directly from InDesign.

Use InDesign to create documents that require precise layout and creative control, such as handouts, newsletters, posters, brochures, manuscripts or books.

Getting Around InDesign

Opening and closing documents

Open and close InDesign documents and template files just as you would in other programs.

You can also use the **File > Open** command to open files from InDesign 1. x or 2.x, InDesign Interchange files, Adobe PageMaker ®6.5 and later, and QuarkXPress. (Third-party vendors may make plug-in software that lets you open other file formats).

Import text or images from non-InDesign files

Go to **File > Place** to import content from other applications

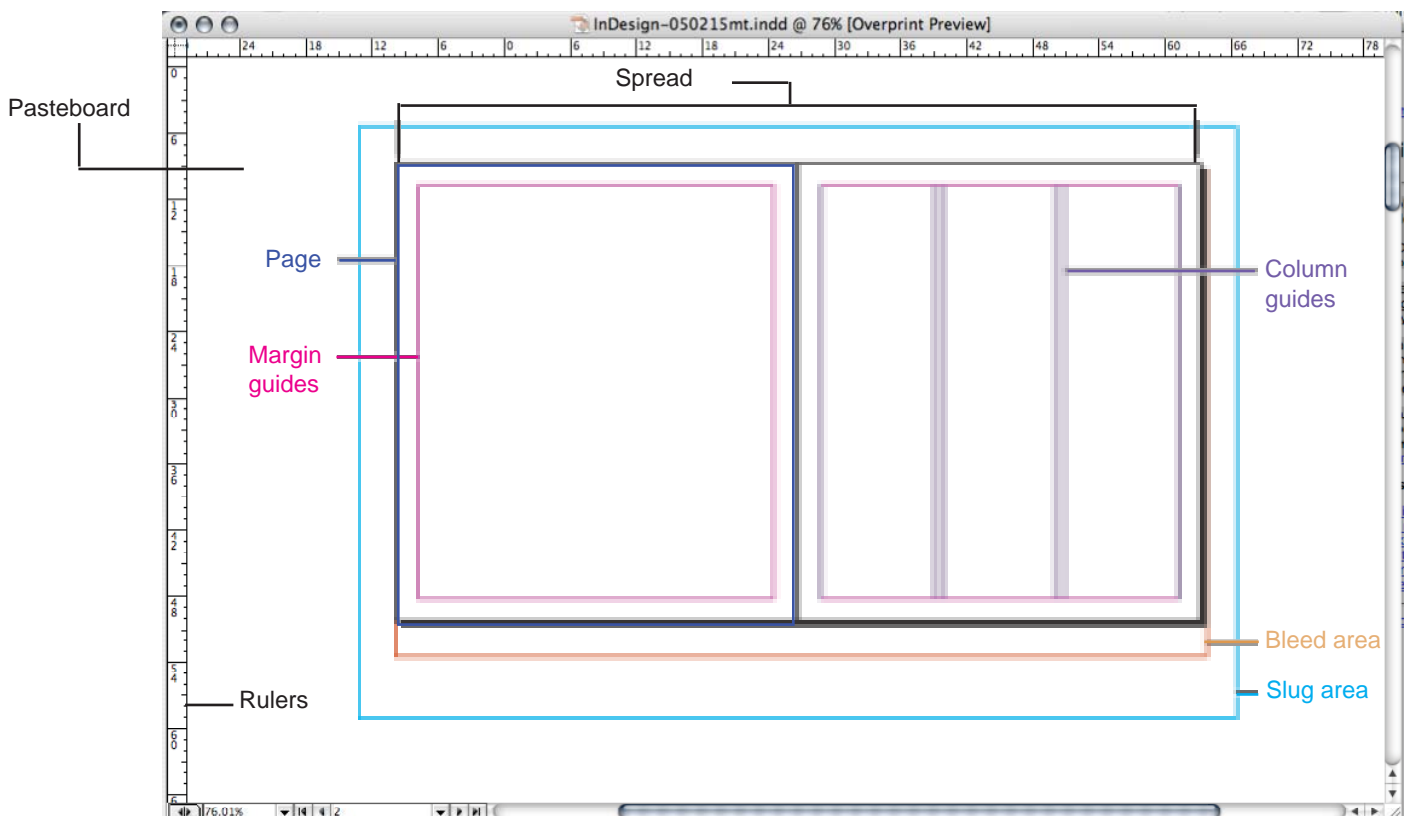
You can import text from .doc, .rtf, or .txt files. Some character and paragraph formatting will be maintained. For instance, styles can be imported from MS Word, but most page-layout such as margin and column settings will be ignored and will need to be re-applied in InDesign.

Typical images formats for use in InDesign documents are .tif, .ai and .eps. You can also import .jpg, .gif, .psd and .png files.

A .pdf file can be imported into an InDesign page, and layout, graphics, and typography will be preserved, but you will not be able to edit a placed PDF page within InDesign.

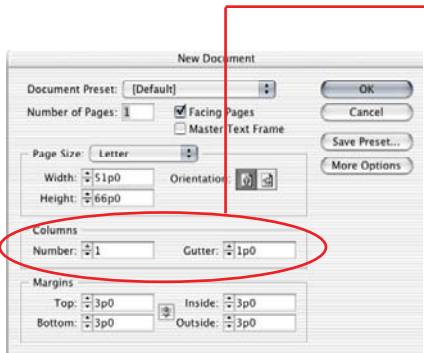
Inside the InDesign window

When you open a blank page, depending on settings made in **File > Document Setup...**, and in the **View** menu , you may see various colored lines that describe the page parts:



Column guides

Column guides appear in the “background” as guidelines, but text blocks can be layed-out anywhere and are not restricted to the columns.



When you create a new document (**File > New > Document...**), you can setup column guides that will appear on every page.

To create additional guides on individual pages:

1. Go to **View > Show Rulers** drag a guide out of the top or left ruler.
2. Position the cursor in the top or side ruler, then **drag to pull a guide onto the page**.
3. Once a guide is on the page you can reposition it using the *Selection tool* unless guides are locked. If guides are locked, right-click on the pasteboard then **uncheck Lock guides**.

To show and hide the outlines go to...

View > Overprint View (hides/shows box around each text objects)

View > Show/Hide Guides (shows or hides margin & column guides)

(Note: Keyboard shortcuts are shown in the menu next to the commands.)

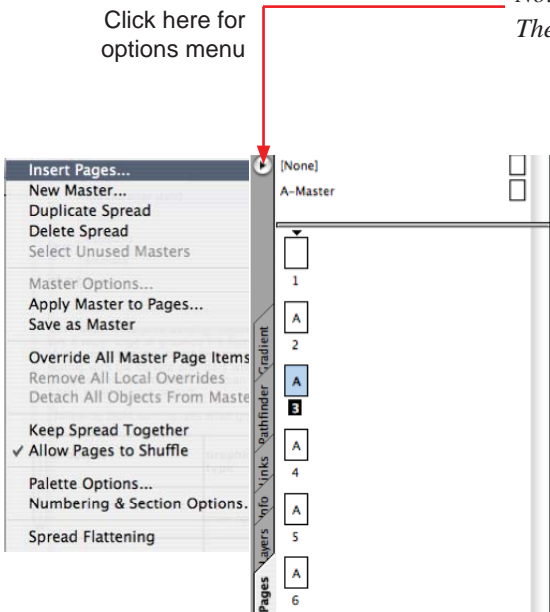
Palettes

InDesign provides both menu commands and palettes for formatting and arranging your pages. Palettes can be tucked away on the right side of the application window (click on bar), or tabs can be torn out of the group to be dragged around the screen, grouped, and regrouped.

Lost Palettes?
Go to **Window > Palette name...**

Note: Every palette has an Options menu that pops-out of the top corner. The menu changes depending on which palette is “on top” in its group.

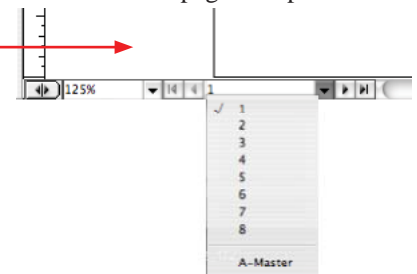
Click here for options menu



The Page palette

Use the page palette to navigate pages, rearrange pages, and attach pages to master pages (see below).

- Use the Pop-out menu off the Page Palette to insert/delete pages or spreads.
- Drag and drop the pages on the palette to rearrange page order.
- Double-click on a page icon to go to that page

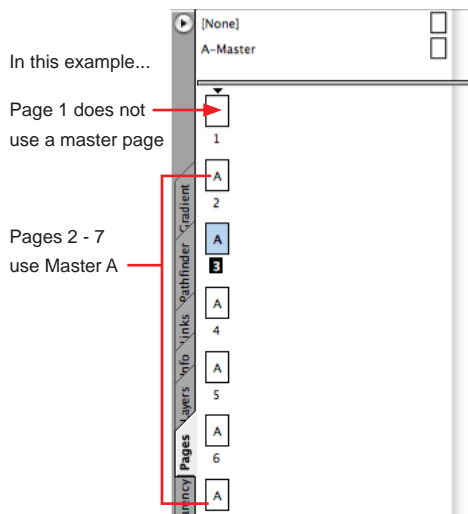


Other methods to navigate pages

- To move ahead one full page, on your keyboard, press **OPTION + the down-arrow**.
- Use the page navigation buttons or pop-out menu at the bottom of the document window to change pages.

Master pages

It's convenient and efficient to use master pages for repeated layouts or layout elements. For instance, you may want to use a master page to include a consistent header and footer on each page, and to include page numbering.



To create a Master page

You can either model a Master page on an existing page (simply drag the page icon onto the Master icon in the Page palette), or you can go to the pop-out *Options* menu of the *Page Palette* and choose **New Master**. Once you set up the *Master* page, you can apply it to pages.

To attach pages to a Master page

In the Page palette, click on the page icon (Shift-click to select multiple pages), then in the pop-out **Options menu** for the *Pages* palette, choose **Apply Master to pages**. (You can also just drag and drop the *Master* icon at the top of the *Pages* palette onto the page icon that you want to attach to the *Master*).

To detach a page from a Master page

Click the page number, then use the *Page Options* menu to choose **> Apply Master**, and choose [None] (or drag the [None] icon onto the page icon in the pages palette).

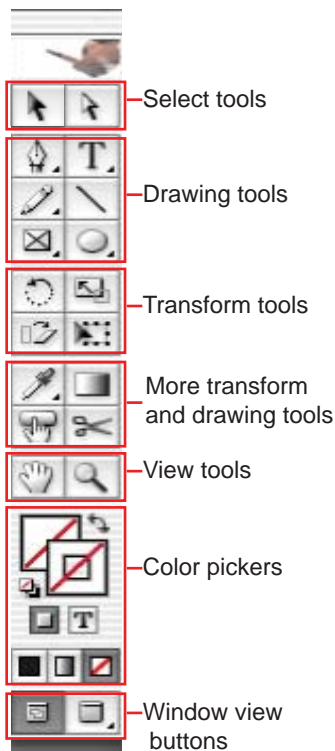
The Toolbox

To choose a tool click on an icon in the Toolbox. Once you move the cursor over the page, the cursor will change to indicate which tool is in use.

Some tools are applied by simply clicking, others, you drag.

There are several groups of tools:

- The **Select tools** are used to reposition, or pick page elements for editing
- **Drawing tools** create shapes and text
- **Transform tools** alter the size and shape of page elements (rotate, scale, etc.)
- **View tools** help to navigate pages
- **Color Picker tools** choose stroke and fill colors
- The **Window View buttons** hide and show the Pasteboard

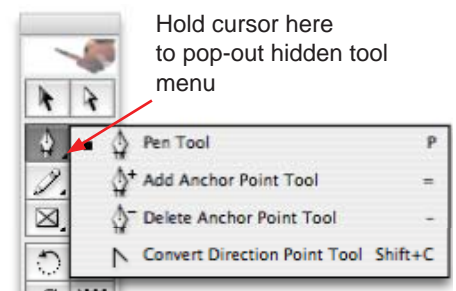


By default, the Toolbox appears as two vertical columns of tools. Double-clicking on the top bar to cycle it through other layouts: from double column, to a single vertical column, to a horizontal row. (The positions of individual tools cannot be rearranged in the toolbox.)

Hidden Tools

The Toolbox contains several hidden tools related to the visible tools.

To get at hidden tools, position the pointer over a tool with a black triangle in the bottom-right corner. Hold down the mouse button to pop-out the tool set, then select a tool.



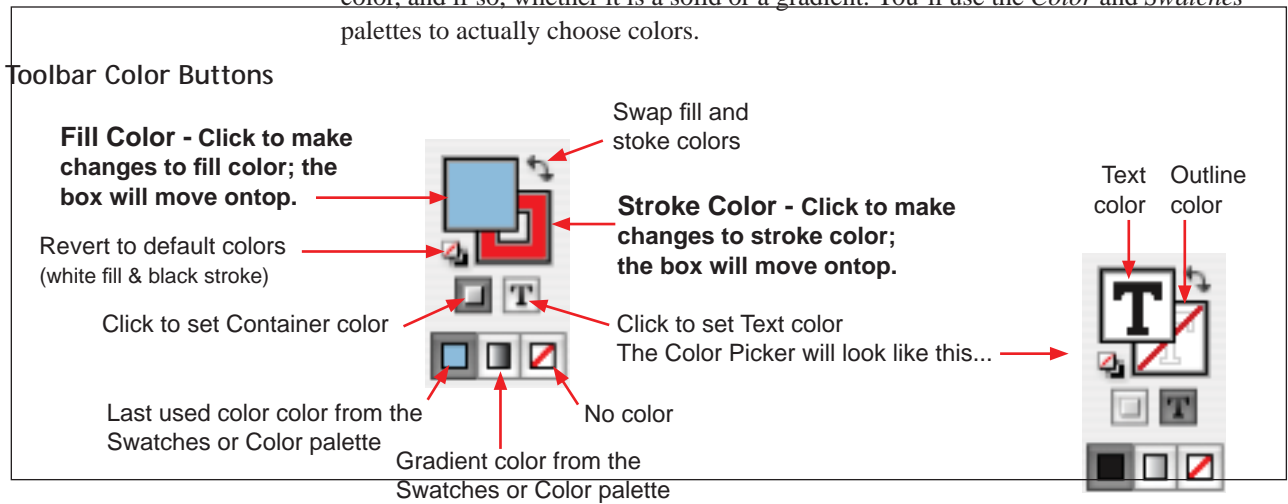
Working with Color

There are several panels for picking colors; they work in sync with one another.

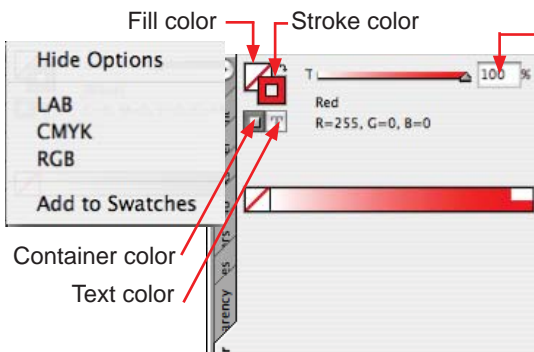
The Toolbar color buttons

The color picker on the Toolbar lets you change the color setup for the currently selected object, or prepare for using a drawing tool when no objects are selected on the page.

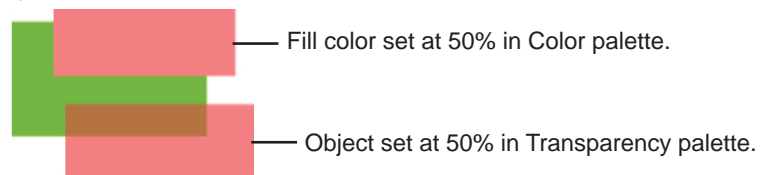
The Toolbar Color Picker is used to determine if an object has a fill color, or a stroke color, and if so, whether it is a solid or a gradient. You'll use the *Color* and *Swatches* palettes to actually choose colors.



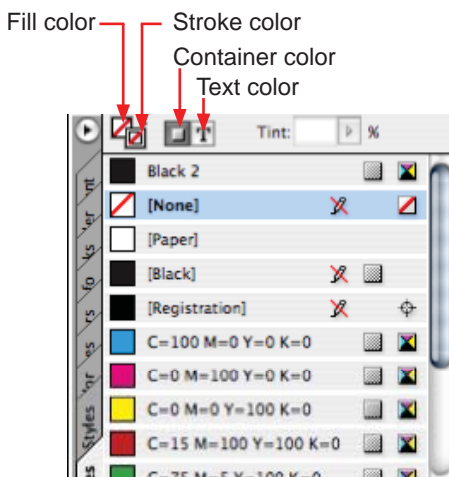
The Color palette



The color palette lets you choose a **Tint** by percentage of a color. For instance, a mid-tone gray would be 50% of black. (This does not make the color transparent, it just mixes a tint of the color. Use the Transparency palette to make objects transparent.)



You can also use the *Color* palette to mix a color, (use the *Options* menu to change mode to RGB) then in order to reuse the color, go to the *Color* palette *Options* menu and choose **> Add to Swatches...**

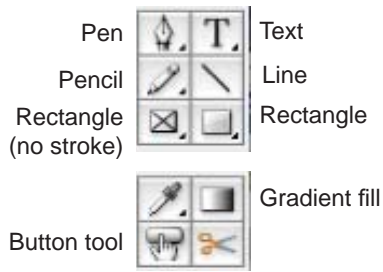


The Swatches palette

The *Swatches* palette stores colors, either as spot colors or process colors. You can reuse colors throughout the document, and then change and update the color wherever it was used.

To mix a new color from the *Swatches* palette, from the *Swatches Options* menu go to **New Color Swatch...** and make a new color.

To change the color of an object, select the object, then click on the new color in the *Swatches* palette.

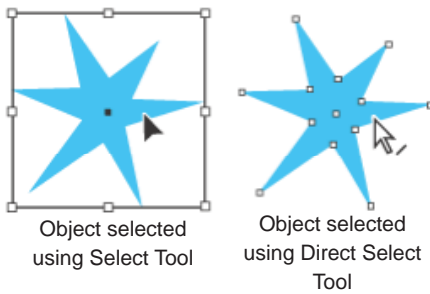




Working with Objects

Drawing objects

Each drawing tool has its particular settings and methods. See the InDesign Help pages for specifics.

Selecting objects



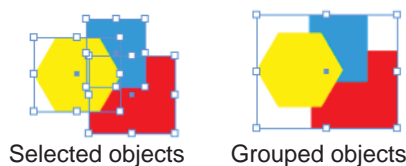
-  **The Select tool** selects an entire object and shows the object's BOUNDING BOX. Use the Select tool, for instance, to reposition the object on the page.
-  **The Direct Select tool** selects an object for editing, and shows PATH and ANCHOR POINTS. Use the Direct Select tool to change the shape of an object. Click on an anchor or on a path between anchors, then drag to change the object's shape.

Select tool tips:

- Drag across multiple objects to select them all
- **Shift+Click** to select multiple objects
- To select an object under another object, **Right-Click (CONTROL-Click - Mac)** then choose *Next Object Below* or *Last Object Below*.

Grouping objects

Grouping objects makes them stick together as one item, so that you can reposition, duplicate, resize, etc., the group with one command.



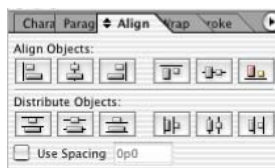
1. Select objects (**Shift+Click** to select multiple objects)
2. In the *Main* application menu (or *Right-Click* menu) go to **Object > Group**.
(To ungroup the group, go to **Object > Ungroup**.)

Duplicating objects



Using the Select tool, hold down the ALT key (Option - Mac). The cursor will change to a double-arrow. Click and drag on the object. A copy will appear.

Aligning objects



Select the objects you want to line-up. Click the appropriate button in the *Align* palette.

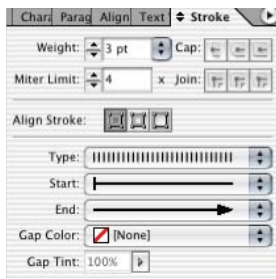
Arranging objects

To change the order in which object “stack,” **right-click (CTRL-Click - Mac)** an object then go to **Arrange > Send Behind, In front, to Back, to Front...**

Copying formatting

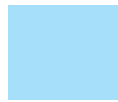


Select an object with the Select tool then get the *Eyedropper* tool and click another object to copy its formatting. *Note: In addition to stroke and fill colors, the eyedropper copies gradient, shadow or feather effects, transparency and for text, font face and size.*



Stroking objects

Need an outline (or to edit an outline) around an object? Select the object with the Selection arrow. Then, in the Stroke panel, choose stroke weight and type (e.g., solid or dotted). If you need arrow heads on a line choose a *Start* or *End* arrowhead. Use the Color or Swatches palette to choose a color.



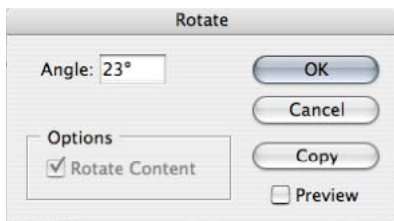
No stroke



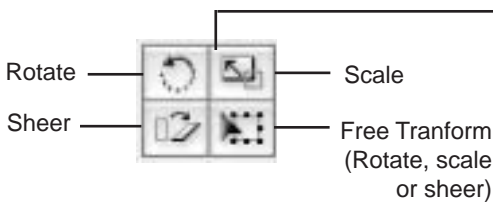
With stroke

Transforming objects

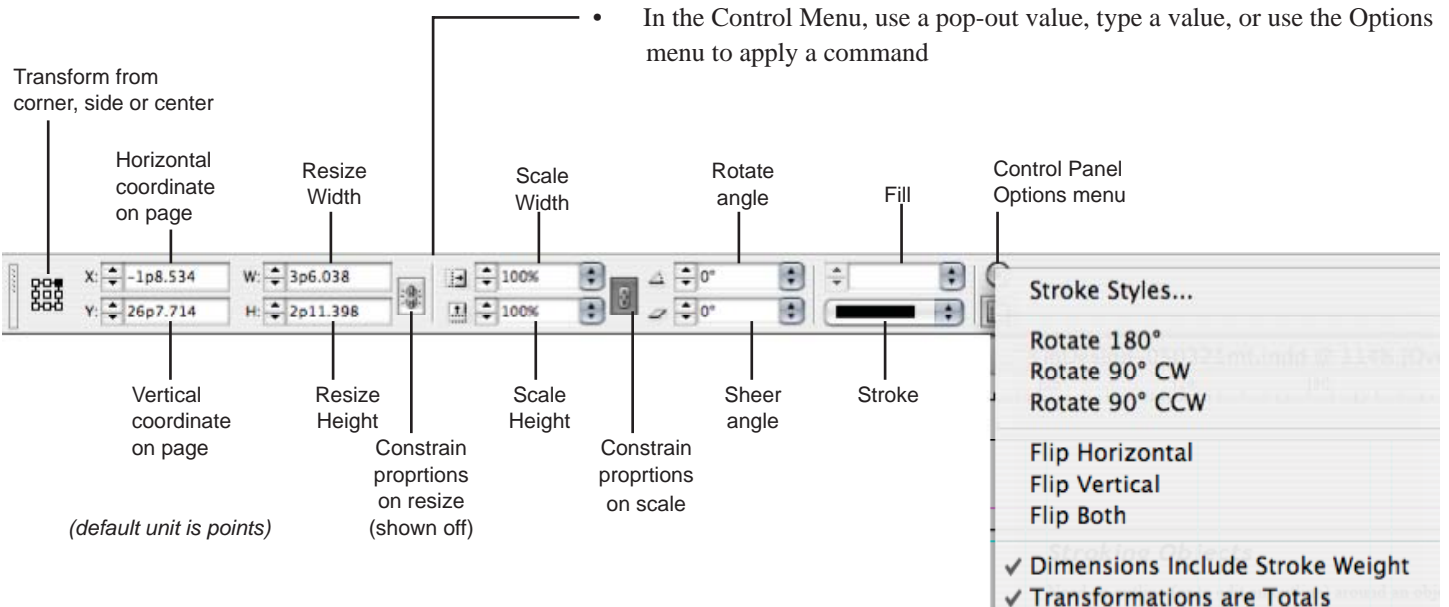
You can precisely position, flip, rotate, scale or sheer objects using a variety of approaches.



1. First, select the object using the Select tool.
2. Then do one of the following...
 - In the main menu choose **Object > Transform > Move, Scale or Sheer...**
A dialog box will open where you can type in a value.



- Use a transform tool from the *Toolbar*.
 - Double click the tool in the Toolbar to fill out values in a dialog box (same as above).
 - Click the tool once, then move to the page and drag to apply the tool freehand.



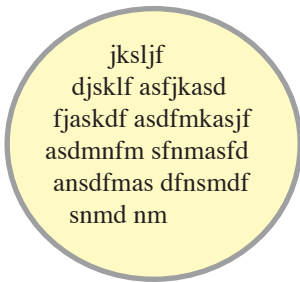
- In the Control Menu, use a pop-out value, type a value, or use the Options menu to apply a command

Working with Text

Text blocks

Drag the Text tool to create a text block, then type into the block.

You can also draw a shape with a tool such as the oval or polygon tool, then type into the shape.



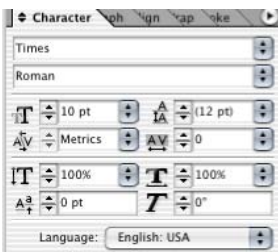
Formatting text with the Control palette

If you don't see the *Control Palette*, go to **Window > Control**.

The *Control Palette* changes depending on what tool is in use. When the *Text* tool is in use you see attributes for formatting text.

Formatting Characters

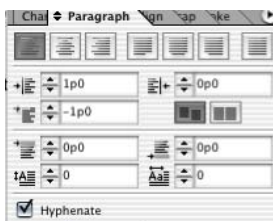
Click the "A" (text) button to see character attributes (font, size, line height, tracking, kerning, superscript, subscript, underline, etc.)



You can also use the *Character Palette* (**Type > Character**).

Formatting Paragraphs

Click the [¶] (paragraph) button to format paragraph attributes (text alignment, left indent, first line indent, right indent, space before, space after, etc.).



Alternately, you can use the *Paragraph Palette* (**Type > Paragraph**).

Using Styles to format text

Generally, it's more efficient to format using styles than to format by hand using the *Control Palette*.

- Formatting can be applied consistently throughout a document.
- Styles can be edited to make formatting changes document-wide.
- Using styles allows you to create a *Table of Contents*.
- Documents will be more portable between applications and ready for use with XML if needed.

Paragraph Styles

Use paragraph styles to format regular blocks of text. *Headline*, *subheadings* and a *body style* are the most commonly used paragraph styles. You may also want *heading* and *footer styles*. In addition to font and size attributes, paragraph styles can include *indents*, *lines before and after*, *line height*, etc.

Character Styles

Apply *Character styles* to selected text within a paragraph. For instance, in this document, whenever we show a **menu command** we have applied a character style.



To create a new style...

Open the *Paragraph Style* or *Character Style Palette* (**Type > Paragraph Styles**).

From the pop-out menu at the top of the palette, choose **> New Style...**

Create settings for each category as needed.

Working with Images

File types

These are the best image file types to use for various sorts of projects, according to your intended output (publishing method) and graphics type.

Final output	Graphics type	Format
High resolution (>1000 dpi)	Vector drawings	Illustrator, EPS, PDF
	Bitmap images	Photoshop, TIFF, EPS, PDF
Process-color separations	Vector drawings	Illustrator, EPS, PDF
	Color bitmap images	Photoshop, CMYK TIFF, DCS, EPS, PDF
	Color-managed graphics	Illustrator, Photoshop, RGB TIFF, RGB EPS, PDF
Low-resolution printing, or PDF for online viewing	All	Any (BMP images only)
Web	All	Any (InDesign converts graphics to JPEG and GIF when packaging for GoLive)


A note about placing images

If the cursor is inside a text frame when you give the > Place command you won't see the "place" cursor. Instead, the image will be inserted "inline" within the text block.

If you want to be able to place the image anywhere on the page, choose Edit > Deselect All, then choose the *Select Tool* before going to the File > Place command.

Placing image files

The most common way to insert an image is:

1. Go to **File > Place...**
2. Browse your computer for the image file and click **OK**.
3. When you return to InDesign you'll see the *Place* cursor. 
4. Click the desired location on a page. The image will appear where indicate as an object the page.

Manipulating Placed images

To move the placed image...

Get the Select tool and drag the image to a new position

To scale, rotate or flip the image...

Use the same transform commands as you would on any object (page 7).

To adjust the color or to run a filter on a linked image...

1. Open the image file in an image editing program such as Photoshop for bitmaps or Illustrator for vector graphics.
2. Make your changes and save the file.
3. Return to InDesign and, with the image selected, go to the *Links* palette *Options* menu and choose > **Update Link...**

Linked & embedded images

Linked files are preferred by Service Bureaus

Most Service Bureaus prefer to receive linked rather than embedded images. This allows them to easily tweak colors on an image without first unembedding the image file.

Embedded files are useful for Backups

Embedding all images in back-up copies of finished InDesign projects prevents the image files from becoming separated from the INDD files.

Linked Files

Placed images are listed in the *Links* palette, and start out as “**linked**” files.

This means that the image file is separate from the INDD file, and that directory structures must be maintained to maintain the link. For this reason we recommend putting a copy of every image file in the same folder as the INDD document before placing images in the document.

Embedded files

You can choose to embed a linked file by selecting the image, then going to the Link palette *Option Menu* and choosing **Embed File**.

The advantage of embedding images: The image file becomes incorporated into the INDD file and no longer has to be carried along with it, so it can't get lost.

The disadvantage of embedding images: The image can't be manipulated outside InDesign and updated while it is embedded.

Unembedding files

In the *Link* palette, click on the image name in the link list and choose > **File Unembed**.

You will be asked to provide a file name and location (save in the same folder as the INDD). You can now manipulate the image outside InDesign and update the changes.

Pasted files

While you *can* use cut and paste to insert images from the clipboard, the disadvantage is that you don't have fine control over the image that placing allows. Cut and paste images do not show in the Link palette and can't be unembedded.

How to lock an object into the text flow

Place the image or text box “inline” rather than as a floating frame.

1. Using the **Text tool**, click in the line of text where you want to insert the object.

2. Choose **File > Place...**

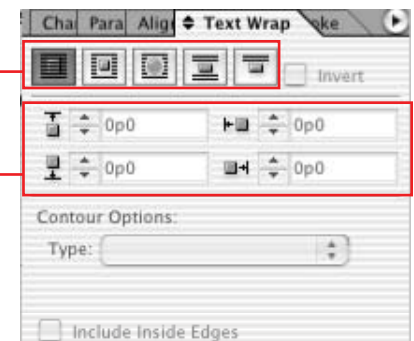
You may need to press return several times to cause the text following the object to continue under rather than behind the object.

Text Wrap

To make text flow around an image (or other object) first select the object, then go to the *Text Wrap Palette* and choose a wrap style.

Click a wrap button to make text flow around a bounding box, around a shape, or to make it jump over an object.

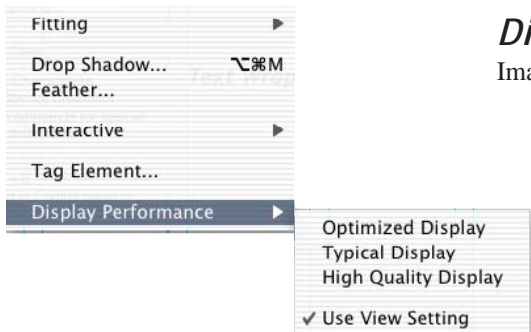
Once wrapping is turned on you can add padding around the object using the margin menus.



Display performance

Images can be displayed with a placeholder, at low resolution or at high resolution.

- To change display settings document-wide, go to **InDesign > Preferences > Display Performance...**
- To change display quality for an individual image, **Right-Click** the image then choose a display quality.



Tips & Troubleshooting

Undoing mistakes

InDesign has multiple undo abilities. Choose **Edit > Undo** repeatedly to back up as far as you need (the number of undo's is limited by RAM).

Or, use **File > Revert** to return to the last Saved state of your file.

Frequently used text commands

Check Spelling

Edit > Check Spelling...

Change Case

Type > Change Case

Insert Special Characters

Type > Insert Special Character (OS keyboard commands for special characters will also work)

Bold Type

CTRL+ SHIFT + B
(or choose Bold in Control panel or in Character Palette)

Italic Type

CTRL+ SHIFT + I
(or choose Italic in Control panel or in Character Palette)

Missing fonts

When you first open a document, if the fonts used are not present you will be alerted. Text for which fonts are missing will be highlighted in pink.

Click the *Find Font* button in the alert box when you first open the document, or choose **Type > Find Font...** to locate or substitute a font. (You may get a mismatch if the file was made on a computer using a different kind of the same font face (for example, True Type, versus PostScript Type 1).

If you install a Font, quit then relaunch InDesign before trying to replace the font in the *Find Font* window.

Missing image files

Image files used in a document are listed in the *Links* palette. Files can be linked from local drives or from a server.

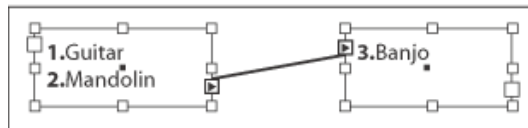
To prevent losing linked files, and to expedite packaging when saving to disk to deliver to a printing service, we recommend storing linked images in the **same folder** as the InDesign document.

More help

For more on these useful topics consult the InDesign Help pages: Go to **Help > InDesign Help...**

Threading text frames

Make text flow from one text box to another, either manually or, at import, automatically. InDesign will even create new pages and text frames based on a Master page.



Creating PDF Files

Export PDF lets you make PDFs for screen or print with full control over image compression, embedded fonts, and accessibility.

Keyboard Shortcuts

Power users will find the usual Adobe keyboard shortcuts. If you already know the shortcuts in Adobe Illustrator or Photoshop, you'll find much the same in InDesign.

Pre-Press Preparation

Among many other output productivity tools, InDesign helps you to make a preflight check, and then to package linked files that you will send to a commercial printer.

Color Management

Wondering how to respond to those "Profile Mismatch" alerts? InDesign uses ICC profiles for consistent color managed work flows when importing images or outputting