

InDesign® CS4 FOR **DUMMIES®**

by Galen Gruman



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About the Author

Galen Gruman is the principal at The Zango Group, an editorial and book production firm. As such, he has produced several books for Wiley Publishing and is a regular contributor to Macworld and CIO. He is author or coauthor of 22 other books on desktop publishing.

Gruman led one of the first successful conversions of a national magazine to desktop publishing in 1986 and has covered publishing technology since then for several publications, including the trade weekly InfoWorld, for which he began writing in 1986 and of which he is now executive editor; Macworld, whose staff he was a member of from 1991 to 1998; and, most recently, Layers Magazine.

Dedication

To the talented designers I've had the pleasure of working with over the years, who have shown me what real artists can do to engage readers effectively and creatively: Kevin Reagan, Dennis McLeod, Sylvia Chevrier, Tim Johnson, Arne Hurty, Richard Merchán, Peter Tucker, and John Anane-Sefah.

Author's Acknowledgments

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Introduction

What is Adobe InDesign, and what can it do for you? In its more than a decade in existence, InDesign has become the most powerful publishing application, one that lets you work the way *you* want to work. You can use InDesign as a free-form but manual approach to layout, or as a structured but easily revised approach. The fact that you can choose which way to work is important for both novice and experienced users because there is no single, correct way to lay out pages. Sometimes (for example, if your project is a one-time publication, such as an ad), creating a layout from scratch — almost as if you were doing it by hand on paper — is the best approach. And sometimes using a highly formatted template that you can modify as needed is the way to go: You don't need to reinvent the wheel for documents that have a structured and repeatable format, such as books and magazines.

InDesign can handle sophisticated tasks, such as glossy magazines and high-impact ads, but its structured approach to publishing also makes it a good choice for newspapers, newsletters, and books. InDesign is also a good choice for corporate publishing tasks, such as proposals and annual reports. In all cases, you can design for printing on paper or electronic distribution as Adobe Acrobat Portable Document Format (PDF) files. Plug-in software from other vendors adds extra capabilities.

Plus, you can use InDesign as the starting point for Web and Flash documents. These electronic documents can include interactive features, such as page transitions, hyperlinks, and buttons to play sounds or a movie.

About This Book

After you get the hang of it, InDesign is quite easy to use. At the same time, it's a powerful publishing program with a strong following among the ranks of professional publishers — and the latest InDesign CS4 version is certain to reinforce that position. Part of its success is due to the fact that its interface is like that of its sister applications, Adobe Illustrator and Adobe Photoshop, which are also components of the Adobe Creative Suite.

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

Conventions Used in This Book

This book covers InDesign on both Macintosh and Windows. Because the application is almost identical on both platforms, I point out platform-specific information only when it's different — and that's very rare. I've used Macintosh screen shots throughout; Windows screen shots are usually identical, except for the dialog boxes to open, save, and export files — these are arranged differently on Macs and PCs (for *all* programs, not just InDesign), but the relevant options to InDesign are the same. If you're a Windows user, a quick look at Adobe's documentation, which shows Windows screens, can show you how the interfaces are nearly identical. So don't worry about them.

Here are some other conventions used in this book:



- ✓ **Menu commands:** They're listed like this: Window⇨Pages. That means go to the Window menu and choose the Pages option from it. In almost every case, the menu command sequences are the same for Mac and Windows users; in a very few cases, they differ (such as the Preferences menu option and the Configure Plug-ins menu option), so I note these differences where they exist by putting the Mac menu sequence first and then the Windows one.

InDesign CS4 has an annoying new feature of hiding menu options from you. The goal is to be less intimidating, but it also means that if you don't know what InDesign can do, you won't find out by looking at the menus. Fortunately, you can tell InDesign to show you all the menus all the time so that no features are hidden. Here's how: Choose Window⇨Workspace⇨Show Full Menus. This book assumes you've turned the menus all on.

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

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

- ✓ **Pointer:** The small graphic icon that moves on the screen as you move your mouse is a pointer (also called a cursor). The pointer takes on different shapes depending on the tool you select, the current location of the mouse, and the function you are performing.
- ✓ **Click:** This means to quickly press and release the mouse button once. Many Mac mice have only one button, but some have two or more. All PC mice have at least two buttons. If you have a multibutton mouse, click the leftmost button when I say to click the mouse.

- ✓ **Double-click:** This tells you to quickly press and release the mouse button twice. On some multibutton mice, one of the buttons can function as a double-click. (You click it once, but the computer acts as if you clicked twice.) If your mouse has this feature, use it; it saves strain on your hand.
- ✓ **Right-click:** A feature first implemented on Windows, but present on Macs since the late 1990s, this means to click the right-hand mouse button. If your Mac has only one button, hold the Control key when clicking the mouse button to do the equivalent of right-clicking in programs that support it. Mac OS X automatically assigns the right-hand button on a multibutton mouse to the Control+click combination; if your mouse came with its own System Preference, you can often further customize the button actions.
- ✓ **Dragging:** Dragging is used for moving and sizing items in an InDesign document. To drag an item, position the mouse pointer on the item, press and hold down the mouse button, and then slide the mouse across a flat surface.

What You're Not to Read



If you see any text in this book that has this icon next to it, feel free to skip right over to the next paragraph. This icon alerts you to geeky information that you don't need to know to use InDesign. I just couldn't help giving you a little extra-credit information in case you were a budding geek like me.

Foolish Assumptions

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

I don't assume that you've ever used InDesign (or any publishing program). But I do assume that you have a basic knowledge of Macintosh or Windows — enough to work with files and applications. And I assume that you have basic familiarity with layout design, such as knowing what pages, margins, and fonts are. But I don't expect you to be an expert in any of these areas — nor do you have to be!

How This Book Is Organized

This book contains eight parts. I also include some bonus content on the InDesignCentral Web site (www.InDesignCentral.com).

Part I: Before You Begin

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

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

Part II: Document Essentials

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

Part III: Object Essentials

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

Part IV: Text Essentials

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

Part V: Graphics Essentials

Very few people would want to read a book with nothing but text, so this part is where I show you how to handle graphics in InDesign — both importing them from the outside and creating your own within InDesign.

Part VI: Getting Down to Business

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

Part VII: Printing and Multimedia Essentials

Whether you're printing a publication or simply creating a PDF file for readers to download from a Web site, you still need to understand the basics of outputting an InDesign document. This part is where I show you how to set up your output files, manage color, and work with service bureaus. You also find out about creating multimedia documents — those with movies, sound, hyperlinks, and buttons — for distribution as PDF files, Flash files, and Web pages.

Part VIII: The Part of Tens

This part of the book is like the chips in the chocolate chip cookies; you can eat the cookies without them, but you'd be missing a really good part. It's a part that shows you some important resources that can help you make the most of InDesign.

Icons Used in This Book



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

When you see this icon, it means I am pointing out a feature that's new to InDesign CS4.



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



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



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



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

Where to Go from Here

If you're a complete beginner, I suggest you read the book's parts in the order I present them. If you haven't used InDesign before but you have used other layout programs, do read Part I first to get in the InDesign frame of mind and then explore other parts in any order you want. If you *have* used InDesign before, peruse them in any order you want, to see what's changed.

As you gain comfort with InDesign, you'll be surprised how much you can do with it. And when you're ready to discover more, take advantage of the wealth of resources out there to go the next level. The InDesignCentral Web site (www.InDesignCentral.com) can help you do that.

Part I

Before You Begin

The 5th Wave

By Rich Tennant



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

In this part . . .

You have your copy of InDesign, and you'd like some basic information on how to get started, right? Well, you've come to the right place. This part helps you sail smoothly through InDesign and gives you a general idea of what InDesign can do. I explain the layout approaches you can take, as well as how to set up InDesign to work the way *you* work.

Along the way, you find out how to navigate the plethora of panels, menus, tools, and shortcuts that can seem overwhelming at first, but which soon become second nature as you gain experience using the program. Welcome aboard!

Chapter 1

Understanding InDesign Ingredients

In This Chapter

- ▶ Getting acquainted with the InDesign approach
 - ▶ Figuring out global versus local control
 - ▶ Getting up to speed on the InDesign vocabulary
 - ▶ Exploring the document window
 - ▶ Surveying the top tools
 - ▶ Becoming familiar with tools and panels
 - ▶ Discovering what's in the menus
-

Starting to use a new software application is not unlike meeting a new friend for the first time. You take a long look at the person, maybe ask a few questions, and begin the process of becoming acquainted. (If you're not new to InDesign but are new to the CS4 version, it's like seeing a friend you haven't seen in a while — you observe any changes and catch up on what's happened in the meantime.)

Just as it's worthwhile to find out the likes and dislikes of a new friend, it's also worth your time to wrap your head around InDesign's unique style and approaches. When you do so, you'll find it much easier to start using InDesign to get work done.

This chapter explains where to look in InDesign for the features and capabilities you need to master. (For a quick look at what's new to version CS4, check out Chapter 25.) I introduce you to the process that InDesign assumes you use when laying out documents, explain some of the terms you'll encounter throughout the book, describe the unique interface elements in the document window, survey the most commonly used tools, and explain how InDesign packages much of its functionality through an interface element called a *panel*.



InDesign CS4 has an annoying new feature of hiding menu options from you. The goal is to be less intimidating, but it also means if you don't know what InDesign can do, you won't find out by looking at the menus. Fortunately, you can tell InDesign to show you all the menus all the time, so no features are hidden. Here's how: Choose Window⇨Workspace⇨Show Full Menus. This book assumes that you've turned the menus all on.

Understanding Global and Local Control

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

What does that mean in practice? That you can use *global* controls to establish general settings for layout elements, and then use *local* controls to modify those elements to meet specific requirements. The key to using global and local tools effectively is to know when each is appropriate.

Global tools include

- ✓ General preferences and application preferences (see Chapter 2)
- ✓ Master pages and libraries (see Chapter 5)
- ✓ Character and paragraph styles (see Chapter 13)
- ✓ Table and cell styles (see Chapter 19)
- ✓ Object styles (see Chapter 9)
- ✓ Sections and page numbers (see Chapter 4)
- ✓ Color definitions (see Chapter 6)
- ✓ Hyphenation and justification (see Chapter 14)

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

Local tools include

- ✓ Frame tools (see Part III, as well as Chapter 16)
- ✓ Character and paragraph tools (see Chapters 14 and 15)
- ✓ Graphics tools (see Part V)