

ADOBE® INDESIGN® CS4

CLASSROOM IN A BOOK®

Instructor Notes

Adobe InDesign CS4 Classroom in a Book

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Writers: John Cruise and Kelly Kordes Anton

Project Editor: Susan Rimerman

Production Editor: Lisa Brazieal

Development/Copyeditor: Judy Walthers von Alten

Technical Editors: Gabriel Powell and Cathy Palmer

Compositor: Jan Martí

Indexer: Karin Arrigoni

Media Producer: Eric Geoffroy

Cover design: Eddie Yuen

Interior design: Mimi Heft

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INSTRUCTOR NOTES

Getting Started

The Adobe InDesign CS4 Classroom in a Book™ course presents students with tips, techniques, and solutions for using the Adobe InDesign CS4 software. The Instructor Notes are intended to complement the information in the Adobe InDesign CS4 Classroom in a Book.

The information is organized to follow the sequence of instruction in each lesson.

About the workbooks

It is recommended that each student in the class have an individual copy of the Adobe InDesign CS4 Classroom in a Book. Students will use this book as you lead them through projects. Additionally, the book can be used as a self-paced tutorial.

Course strategy

If you're teaching a 12-session class, you can teach approximately one chapter of this book per class. The book contains 14 lessons, some of which may take a while to complete. If you are teaching a 10-session class, you may want to combine some of the lessons in a single class. For example:

- Lessons 5, 6, and 8 are focused on different aspects of working with importing and formatting text.
- Lessons 4 and 9 are both focused on working with graphics and frames.

We recommend that, at an absolute minimum, you teach Lessons 1 through 9 along with 13 (Lessons 10 through 12 and 14 cover more special-purpose features.) The majority of the basic Adobe InDesign features and the InDesign work environment are covered in these lessons. However, completing all the lessons makes a far superior introduction. Before beginning a lesson, encourage students to browse through it, and read any sidebars.

Managing student projects

One way to simplify file storage and retrieval in classroom situations is to ask students to create a folder on their hard disks, name it [Student's, for the student's name] Lessons, and then copy each project folder into the main Lessons folder. Having students keep all their working files in their own Lessons folder makes it easy for you to clean up files when a class is over.

Additional resources

For complete and up-to-date information about using InDesign panels, tools, and other application features, visit the Adobe website. Choose Help > InDesign Help. You'll be connected to the Adobe Community Help website, where you can search InDesign Help and support documents, as well as other websites relevant to InDesign users. You can narrow your search results to view only Adobe help and support documents, as well.

If you plan to work in InDesign when you're not connected to the Internet, download the most current PDF version of InDesign Help from www.adobe.com/go/documentation.

For additional resources, such as tips and techniques and the latest product information, check out the Adobe Community Help page at community.adobe.com/help/main.

Note: If InDesign detects that you are not connected to the Internet when you start the application, choosing Help > InDesign Help opens the Help HTML pages installed with Photoshop. For more up-to-date information, view the Help files online or download the current PDF for reference.

Adobe Design Center

The U.S. Adobe website at www.adobe.com contains a variety of InDesign training and support resources, including the Adobe Design Center for InDesign. Many step-by-step tutorials, galleries, and other resources are available at the Adobe website, and the User-to-User Forums are a great place for students to learn from more experienced users. Adobe Design Center provides hundreds of tutorials from experts and authors in the community, as well as thoughtful articles about design and technology.

Go to: www.adobe.com/designcenter/

Adobe Certified Expert (ACE) program

This program is designed to validate an expert skill level of Adobe InDesign CS4. Careful testing of candidates ensures that each ACE has demonstrated expert product knowledge of the current release of Adobe InDesign, resulting in increased marketability and an added credential. Training for the ACE program is available through Adobe Authorized Training Center (AATC) and self-study.

For more information about this program, send an e-mail to certification@adobe.com or visit the Adobe website at: www.adobe.com.

Lesson 1: Introducing the Workspace

This lesson provides an overview of the work area and basic functionality of InDesign. By the end of the lesson, students should understand how all the basic InDesign elements work together to create page layouts. They should also understand the overall interface of InDesign, including, how to access panels, where tools are located, and how objects are placed inside of frames.

Tools panel

Pages 9–11: Many of the tools have popup options—so tools you need to access may be hidden beneath other tools. All the tools and all the popups are shown on page 10. The tool tips for each tool display its name and single-letter shortcut. The Tools panel can be configured in various ways, including horizontal.

Application bar and Control panel

Pages 11–13: The Application bar displays across the top of the screen by default, but can be hidden to save screen space (Mac OS only). The Control panel also displays across the top of the screen; most users keep it open but you may wish to move it to the bottom of the screen.

New window

Page 13–15: It is important to note that new windows are not the same as new documents. You can create multiple views of the same document, opening new windows as necessary. Each window is simply a separate view of the same document.

Panels and workspaces

Page 15-18: With the proliferation of panels in InDesign, it's important to keep the workspace neat and organized. Encourage students to learn to open, close, dock, float, collapse, expand, and group panels to meet specific needs—then save that panel configuration as a workspace.

Panel menus

Page 19: Make sure students know that panels have menus that provide additional features and panel-customization options.

Zooming

Page 20: While the Zoom tool works well, you can work more efficiently by holding down the modifier keys to temporarily activate the Zoom tools. Use Command + Spacebar (Mac) or Ctrl + Spacebar (Windows) to temporarily activate the Zoom tool, which allows you to quickly increase your magnification without having to switch tools. You can find other zoom controls in the View menu and on the Application bar.

Navigating and scrolling

Page 22–24: InDesign lets you “turn pages,” jump to a specific page, and scroll through documents. You can also use the space bar to temporarily activate the hand tool to scroll through a document. When entering text, using the Alt (Windows) or Option key (Mac OS) to temporarily access this tool, rather than needing to switch using the Tools panel. Another shortcut option is to simply use Alt+Spacebar (Windows) or Option+Spacebar (Mac OS) any time, no matter what context.

Context menus

Page 24: Context menus are widely used throughout InDesign—for example, you can modify an object’s stroke weight from a context menu or start a spell check within text. To display context menus, Control+click (Mac OS) or right+click (Windows) on objects, within text, on pages, and more. These helpful menus provide quick access to frequently used features.

Questions

- 1 How can you save a panel configuration?
- 2 If you are looking for a tool and it is not visible, where might it be located?

Answers

- 1 Panel configurations are saved as workspaces (Window > Workspace > New Workspace).
- 2 Some tools are nested, as they are located behind other tools. You must click and hold down on a tool to select any tools that are nested behind it.

Lesson 2: Getting to Know InDesign

This lesson provides an overview of all the key features in InDesign, from opening files to adding text to working with graphics. The lesson focuses on “best practices,” showing how keeping output in mind can prevent eventual problems and using styles can streamline production.

Adobe Bridge window

Pages 30–31: Many Adobe Creative Suite workflows depend on Adobe Bridge for organizing files. Point out how much more information is available about a file when opening it through Bridge, including Metadata and Previews.

Preflight panel

Pages 33: While students are not ready for output, the Preflight panel is introduced to show that all design decisions—even in the early stages—can impact final output. Students should get in the habit of keeping an eye on the Preflight panel to prevent common errors such as missing fonts, incorrect color usage, overset text, and more.

Text and threading

Pages 35–39: Point out that students use the Type tool for creating text frames, typing text, and editing text. Any tool can be selected for importing text. The Selection tool, however, is the only tool you can use for threading text frames.

Styles

Pages 43–48: Styles are introduced here to get users in the habit of working with basic styles even on simple documents. For example, most documents will have paragraph styles for Head 1, Head 2, and Body Text. Creating and applying these will significantly streamline text formatting for the remainder of the document.

Graphics

Pages 48–52: Importing, placing, repositioning, and cropping are key elements of working with graphics.

Questions

- 1 What are some advantages of using styles?
- 2 What are the key tools you need for working with text and graphics?

Answers

- 1 When you use styles, you can apply multiple formats to text and objects in one click. If you change your mind about formatting, you only need to modify the style rather than every object. This ensures quick, consistent formatting throughout a document.
- 2 To work with text, use the Type tool. To work with graphics inside frames, use the Direct Selection tool or the Position tool. The Position tool lets you thread text and work with frames.

Lesson 3: Setting Up a Document and Working with Pages

This lesson provides the foundation for creating new documents. This lesson is focused on how to create custom page sizes, defining a master page, and applying master pages to a document page.

Creating and saving custom page settings

Pages 59–60: You are not required to create a document preset before creating a new document. You should create document presets only if you will be frequently reusing custom page settings, such as page size and margins.

Master pages

Page 61–79: Understanding of master pages is critical for anyone who will be creating longer documents. They avoid repetitive formatting tasks, and are widely used by anyone creating longer documents.

Guides

Pages 62–64: You can place guides on either document pages or master pages. All guides can be modified on document pages, whether they are page guides, ruler guides, margins, or columns. It is not necessary to modify them on the master page if they need to be modified in only one instance on a specific document page due to a specific, unique page layout. Notice that when a guide is placed on a master page that it is not editable (you cannot select it) on document pages based on the master page. Students may either need to break the master link to the guide or edit it on the master page.

Placeholder frames

Pages 69–72: It is not necessary to create placeholder frames before importing objects. While this lesson uses a foundation of placeholder frames on master pages to create a consistent layout, you can also create frames on document pages when you import graphics and text.

Text linking

Pages 75–77: This is another key concept, as any document that has text running from one page to another will need to use links. Be certain that your students understand this concept before moving into other longer documents.

Adding sections

Pages 80–81: Many documents, especially long documents with front matter, don't start with page number 1 but instead begin on page that uses a different numbering system, for example upper case or lower case Roman numerals. The ability to specify independently numbered sections and choose among several numbering styles allows you to create custom numbering schemes within long documents.

Adding pages

Page 82: As an alternative, you can drag master page icons from the top of the Pages panel to the bottom of the panel to add pages to a document. Students can also use the menu item Layout > Pages > Insert Pages as another alternative.

Placing text and graphics

Page 83: When students attempt to place the palm tree image (03_d.psd), in step 3, it may prove difficult. Tell students to watch the cursor (the loaded graphics icon) to tell when to place the image. If they click too low on the graphics frame, they will place the picture in the text frame that is on top of it on the master page. Tell them to click on the very top portion of the graphics frame where it doesn't overlap the text frame. If they don't place the graphic in the correct frame, they can choose Edit > Undo to return to the loaded graphics icon and try again.

Eyedropper tool

Page 86: Using the Eyedropper tool can be tricky. Make sure that the students select the correct text and select the Text Fill box in the Tools panel before selecting the Eyedropper tool. If the Text Stroke box is selected instead of the Text Fill box, the color of the text won't change when they click the graphic with the Eyedropper tool.

Rotating spreads

Page 87: The ability to rotate spreads is new in InDesign CS4. This feature is particularly useful for laying out landscape-oriented pages in documents with portrait-oriented page dimensions and vice versa. When you print a document with rotated pages, InDesign will automatically adjust the orientation of the rotated pages so that they print correctly, which means that you don't have to unrotate pages before printing.

Questions

- 1 When are master pages most useful?
- 2 Where can you create guides that will appear on all pages?
- 3 How can you avoid repetition when creating documents that will all be the same size?

Answers

- 1 When you have long documents with repetitive page formatting, such as running headers, running footers or a consistent layout used on a number of pages.
- 2 You can create a master page with guides.
- 3 You can create a Document Preset or you can create a template document.

Lesson 4: Working with Frames

This is an important chapter, as all text (except for text that flows along a path) and graphics are placed within frames. In this lesson students learn that building pages in InDesign involves placing content (text and graphics) within containers (text frames and graphics frames) and modifying the content and the containers.

Working with layers

Pages 95–98: Layers are another key concept. These pages take students through the basics of layers and make them aware of the layer on which they are currently working. It's important for students to understand that layers are not appropriate for all documents. For example, simple documents with few objects may not benefit from having layers. Also, if a document is initially set up with layers, it's easy to forget about them later when design or production begins.

One thing that continually trips up novice InDesign users is a locked layer. If you encounter an object that cannot be selected, it's possible that the object is a master object, the object has been locked (Object > Lock Position), or the object is on a locked layer.

Fitting frames to their content

Page 100, step 6: The ability to fit frames to content by double-clicking a frame handle was introduced in InDesign CS3. Allow students to practice with text and pictures and double-click different frame handles to see the results (especially with pictures).

Select tool vs. the Direct Selection tool

Page 101: It is important to understand when to use the Selection tool and when to use the Direct Selection tool when resizing and reshaping frames. Use the Selection tool to change the dimensions of a frame; use the Direct Selection tool to change the shape of the frame by moving anchor points. It's easy to forget which tool you are currently using. If you accidentally modify a frame using the wrong tool, choose Edit > Undo and then select the correct tool.

Graphics frames

Page 101: In addition to placing graphics within frames created with the Rectangle Frame tool, the Ellipse Frame tool, and the Polygon Frame tool, you can also place graphics within frames created with the Rectangle tool, the Ellipse tool, and the Polygon tool. Warn students that while it's possible to place graphics within a text frame, the result is an anchored graphic, which behaves differently (like a character within text) than a graphic placed within a frame that's not a text frame.

Duplicating objects

Page 107: InDesign offers several options for duplicating objects. You can hold down the Alt (Windows) or Option (Mac OS) key while dragging an object to duplicate it, you can choose Edit > Duplicate or use the keyboard shortcut (Alt+Shift+Ctrl on Windows or Option+Shift+Cmd on Mac OS), or you can use the Step and Repeat command (Edit menu) if you need to create multiple copies of an object. Of course, Copy and Paste (Edit menu) also works.

Resizing a graphics frame (cropping)

Pages 107–108: Changing the crop of an image does not change the image itself (that is, the original graphics file is not affected by cropping within InDesign). The visible area is all that changes when you resize a graphics frame.

Select tool vs. the Direct Selection tool

Page 108–109: It is important to understand when to use the Selection tool and when to use the Direct Selection tool when working with graphics and graphics frames. Use the Selection tool to move an image and frame together; use the Direct Selection tool to move the image but not the frame.

Changing the shape of a frame

Page 112, step 7: When students attempt to manipulate the upper-right corner of the frame, make sure that only the upper-right point is selected. This may require clicking off of, then on the upper-right corner point with the Direct Selection tool.

Text wrap

Pages 113–115: While this exercise has students wrap text around an irregularly shaped polygon, you will most frequently use the second button in the Text Wrap panel to wrap around the bounding box of an object. If you apply a text wrap to an object, text within text frames that are either above or below the object is affected. If you want to wrap text only around objects that are in front of text frames, select Text Wrap Only Affects Text Beneath in the Composition section of the Preferences dialog box (Edit > Preferences > Composition on Windows; InDesign >

Preferences > Composition on Mac OS). Text wraps are applied to text regardless of the layer on which objects are placed.

Rotating objects vs. rotating content

Pages 119–120: InDesign provides several options for rotating objects. In addition to using the Rotation tool, you can use the Rotation Angle field in the Control panel or the Transform panel, or you can choose Object > Transform > Rotate. Although it's possible to rotate a graphic within a graphics frame by selecting the graphic with the Direct Selection tool and then using any of the aforementioned options, it's not possible to rotate the text within a text frame.

Selecting an object within a group

Pages 123–124: You can select an object that's part of a group by clicking it with the Direct Selection tool. Another method is to double-click an object within a group using the Selection tool. This selects the object you click and switches to the Direct Selection tool.

Questions

- 1 What is the difference between the Selection tool and the Direct Selection tool?
- 2 When might you use the Inset Spacing controls in the Text Frame Options dialog box?
- 3 Name two ways to fit a frame to its contents.

Answers

- 1 Use the Selection Tool to manipulate an entire frame. For example, use the Selection tool to move a frame (text or picture) and its contents or to change the dimensions of a frame. Use the Direct Selection tool to select and move individual anchor points, line segments, and the content of graphics frames.
- 2 Use the Inset Spacing controls to move the text within a frame away from the edge of the frame when you've applied a stroke and/or a fill to the frame. The resulting space between the edge of the frame and the text makes the text easier to read.
- 3 You can fit a frame to its content by double-clicking a frame handle or by choosing Object > Fitting > Fit Frame To Content.

Lesson 5: Importing and Editing Text

Because most InDesign documents include text created using other programs, you should become familiar with the process of importing text and flowing it through the pages of a document.

Missing fonts

Page 130-132: Make sure students know that fonts are separate files that may or may not be active on their systems. A “missing font” is not active—and possibly not present on the system. To resolve missing fonts, users can locate and activate the font or replace the font with a different font. InDesign indicates missing fonts as follows:

- Missing fonts are listed in an alert when you open a document.
- The Font menu in the Character panel lists missing fonts in brackets.
- Missing fonts are highlighted in pink in the layout (except in Preview mode).

When you pass a document to another user or prepare it for output, using the Package feature helps prevent missing fonts by collecting copies of the fonts. Remember that fonts are software, and they should only be installed within the rules outlined in the licensing agreements.

Threading text frames

Pages 134–147: InDesign provides many methods for flowing text through a document, from simply importing text into one frame to threading frames manually to automatically adding new pages to contain text. To decide on a method, it can be helpful to look at the word-processing file to see how much text is being imported and how it’s organized. Remind students that if they misplace or replace text when placing or threading that Edit > Undo will work wonders.

Styles

Pages 136–137: This section provides a quick overview of the benefits of using styles to apply multiple formats to type in a single step. Lesson 8 covers styles in greater depth.

“Continued on” lines

Pages 140: Creating “continued on” lines, also known as jump lines, requires precision. Make sure text wrap is not applied to any objects that the jump line text frame is near. Also, make sure that the two text frames fully touch to get the Next Page Number to work.

Columns

Page 143–144: You can also use the Number of Columns command in the Control panel to divide a frame into columns. Using a single frame divided into columns can be easier than creating and threading two text frames because you only have one frame to move, resize, format, etc.

Find/Change

Page 148: The Find/Change capabilities can be overwhelming. Point out to students that they can click Fewer Options when performing simple text searches. If it seems like Find/Change is not working, check the state of all the buttons (such as Case Sensitive) and make sure nothing extra is specified in the Find Format area.

Checking Spelling Dynamically

Page 153: Tell students that they can turn this feature on whenever they need it, and turn it off whenever it's distracting.

Using the Story Editor

Page 156: The Story Editor may be useful for students producing documents that include a great deal of linked text. The Story Editor makes it much easier to work with longer sections of text.

Questions

- 1 How can you spell check all the text in a document?
- 2 Name two ways that you can turn a single column text frame into a multiple column text frame?
- 3 What is the difference between a character style and a paragraph style?

Answers

- 1 You can choose the Document option in the Check Spelling dialog box (accessed from the Edit menu).
- 2 Either by choosing Object > Text Frame Options or by accessing the Number of Columns box in the Control panel.
- 3 Paragraph styles apply to an entire paragraph, while Character styles apply only to text that is selected.

Lesson 6: Working with Typography

This chapter provides an introduction to many of InDesign's more refined typographical features such as baseline grids, kerning, tracking, OpenType fonts, drop caps, hanging punctuation, and paragraph compositors.

Baseline grids

Pages 163–165: Because both the baseline grid and leading control the amount of space between lines, you need to work with both options when using the baseline grid. You can set leading values to be equal to or less than the baseline grid option,

otherwise type may skip to the next grid line, which may provide too much space between the lines.

Space between paragraphs

Pages 165–166: New students frequently use extra paragraph returns to add spaces between lines, or try unusual techniques to increase line spacing. The Space Before and Space After options are the most consistent methods for adding space between two paragraphs. You can also use the Leading options for adjusting line spacing. Additionally, you can use the baseline grid to set the line spacing. All of these can be used with paragraph styles, making it easy to make changes to multiple paragraphs in a single step.

Fonts and styles

Pages 166–171: When working with type styles and glyphs, it's important that students understand that these features are built into fonts. Since all fonts are not created equal, these features are not always available.

Hanging punctuation

Page 172: The feature, called Optical Margin Alignment, is a story attribute—it applies to all the text in a series of threaded text frames. It can, however, be turned off for selected paragraphs through the Optical Margin Alignment panel menu.

Drop caps

Pages 173–175: Many users do not realize that Drop Caps are a paragraph format, and therefore do not require you to select the characters to format as drop caps. Because of this, you can also specify them in paragraph styles.

Letter and word spacing

Pages 175–176: Changing the kerning and tracking of headlines and larger type is often necessary. Make certain that your students understand the difference between kerning, which controls the space between character pairs, and tracking, which controls the space between multiple characters.

Composers

Pages 176–178: Explain the benefits of the Adobe Paragraph Composer—that it considers line breaks in the entire paragraph when hyphenating and justifying text. The Adobe Single-line Composer considers only one line at a time and may produce less desirable spacing.

Working with Tabs

Pages 178–180: Emphasize the importance of showing Hidden Characters while working with tabs.

Paragraph rules

Page 182: You can add rules (lines) above or below paragraphs through paragraph formats and paragraph styles. This is much quicker than drawing lines and anchoring them in text—or worse, drawing lines and moving them each time text reflows.

Questions

- 1 How can you easily apply a drop cap to all of the first characters used in multiple stories across a document?
- 2 If type is ignoring the baseline grid, how can you correct this situation?

Answers

- 1 You can create a paragraph style and apply it to the first paragraphs where you want the drop cap to appear.
- 2 You may simply need to apply the baseline grid to the type from the Paragraph panel. But if the type has been told to align to the grid and it is working inconsistently, there is probably a leading value, a space before or a space after that is causing the text to not use the grid for alignment. Reduce or remove these values to have the grid work appropriately.

Lesson 7: Working with Color

This lesson provides a more detailed look at the methods for creating, saving and applying colors. Students may note that colors on screen are not necessarily consistent between computer monitors and printed output, which is addressed in the color management portion of this chapter.

Preflight profiles

Page 189–190: Explain to users that their output providers (commercial printers) can provide Preflight profiles that help ensure that their documents use the appropriate colors, fonts, stroke widths, and more.

Color swatches

Page 191–192: Creating color swatches is similar whether you are mixing CMYK colors or choosing spot colors (such as a PANTONE color). Encourage students

to work primarily in the Swatches panel, as it provides one central location for creating, saving, applying, and modifying colors.

Dashed strokes

Pages 194–195: While InDesign provides a great many stroke choices, you can also create customized stroke types by choosing Stroke Styles from the Stroke panel menu. These styles then become available in the Type drop-down menu in the Stroke panel.

Gradient swatches

Pages 196–197: More advanced students might experiment with creating gradients with more than one color. You can click on the bottom of a gradient ramp, between the two stop colors to add an additional stop color. You can then change the additional color to meet your needs.

Type color

Page 201–202: Since color can be applied to the stroke or fill of selected text or the background of a text frame, students need to follow the steps in this section closely.

Color management

Page 207–209: Before performing the steps in this section, students should read the background on color management to see why it's necessary and how it works.

Page 212–213: You may have students choose different working spaces if they are using different computers or if they are using different printers for proofing.

Page 213: Not all image file format support embedded profiles. Some that do support profiles include .psd, .ai, .tif, and .jpg.

Questions

- 1 How can you edit the name or attributes of a color swatch?
- 2 How do you create a new color swatch?
- 3 How can you change a spot color to a process color?
- 4 What is the difference between color management and color correction?
- 5 What is a profile?

Answers

- 1 You can double-click on a color swatch to edit its name and attributes. Be careful that you do not have an object selected when you do this, as you may apply the color to the object at the time you click the swatch to edit it.

- 2 You can click the New Color Swatch button or choose New Color Swatch from the Swatches panel menu.
- 3 You can edit the swatch and change it to a Process color and change its Color Mode to CMYK and its Color Type to Process.
- 4 Color management helps you to achieve more consistent color, while color correction is used to fix color related problems.
- 5 A profile is used to identify the characteristics of a device—such as a scanner, a monitor or an output device. The profiles are used by InDesign to render an image so that when it is viewed on screen or on a proof it more closely resembles the final product.

Lesson 8: Working with Styles

Styles are a critical feature for any document that uses repetitive formatting, especially longer documents. Too often styles are under utilized by students—they don't want to be bothered with creating them. You should encourage your students to gain a firm grasp of the concepts and features for character, paragraph, object, table, and cell styles. Also, it is important to distinguish early on between paragraph and character styles.

Paragraph styles

Page 231–233: Emphasize to students that you only need to click in a paragraph to apply a paragraph style—you don't have to select the whole paragraph. All the formats apply to all the text in the paragraph.

Character styles

Page 234–236: Character styles apply to selected text within a paragraph. Generally, users create character styles to quickly apply multiple formats (such as font, size, and style) in one click. You can also create a character style to easily apply a single format—such as Bold or Italic. When creating a character style, any formatting not explicitly identified in the New Character Style dialog will remain as-is after the application of the style. So a single style that applies the Bold format can be used to create Minion Pro Bold and also Adobe Garamond Pro Bold (providing that both of these fonts are installed).

Nested styles

Pages 238–244: If you have paragraphs that always start with a certain formatting pattern, you can combine character and paragraph styles together to build a nested style. Nested styles allow you to automatically style the first several words or characters of a paragraph using a character style, then format the remaining portion of a paragraph using a paragraph style. The formatting occurs in a single click. If your

students are advanced, you may want to have them add multiple character styles as a nested style or experiment with line styles.

Object styles

Pages 244–247: Object styles allow users to save formatting applied to frames—including formatting applied to text and graphics inside of a frame.

Table and cell styles

Page 248–253: Table and cell styles allow users to save formatting applied to tables and cells—including formatting applied to text inside of a cell.

Updates to styles

Page 253–255: You can update character, paragraph, object, table, and cell styles to match new formatting using the same technique. Updates to styles automatically affect all instances where the style is used.

Loading styles

Page 255–257: If you’ve already created styles in another document, you can import them into another InDesign file using the Load command from the panel menu.

Questions

- 1 How do character styles differ from paragraph styles?
- 2 When applying a character style, what steps are necessary, and how does this differ from applying a paragraph style?
- 3 What types of styles are involved in creating a nested style?

Answers

- 1 Character styles include only character formats (font, size, color, scaling, kerning, etc.)—the formats that are located in the Character panel and not those located in the Paragraph panel.
- 2 When applying a character style you must first highlight the text to be formatted. Only the highlighted text is styled when applying a character style. Alternatively, paragraph styles apply formatting to an entire paragraph, even if the cursor is only inserted in the paragraph. No text needs to be highlighted when applying a paragraph style.
- 3 A paragraph style and a character style.

Lesson 9: Importing and Linking Graphics

By default InDesign saves the location (that is, the pathname) of graphic files that are placed in an InDesign layout; it does not save placed graphics within the document file because this could result in enormous and unwieldy files. (Note: It is possible for users to choose to embed graphic files within an InDesign file, though this is generally not recommended.) This lesson provides a foundation for managing imported graphics using the Links panel and for using an InDesign library file for saving frequently used objects.

Missing and modified images

Pages 264–268: The Links panel displays a list of all graphic files that have been imported into a document. When you print an InDesign document, the original graphic files are sent to the printer along with the InDesign document. Remind students that they should watch for yellow triangles, which indicate images that may have changed since the time they were imported, and red stop signs, which indicate that InDesign cannot locate the original graphic file. Although it's possible to print and export InDesign documents that contains missing or modified graphics, this is generally not advisable because low resolution versions of the modified/missing graphics are used instead of the original files.

Note that you can also maintain links to imported text files, and placed text files are listed in the Links panel along with placed graphics. However, this is not a common workflow and is not covered in this training.

Adjusting view quality

Page 269: The Typical Display view setting is the default option for imported graphics and uses a low-resolution image that's appropriate for identifying and positioning graphics. If you have a need to see the original, high-quality artwork, you can change the view setting for a particular graphic by selecting its frame with the Selection tool and then choosing Object > Display Performance > High Quality Display. You can change the default view setting by choosing High Quality from the Default View menu in the Display Performance section of the Preferences dialog box. Caution students that working in High Quality display mode all of the time can slow down performance.

Working with clipping paths

Pages 270–272: You can use work paths, clipping paths, and alpha channels—all of which can be included in a graphic—to specify the visible portion of an image. Caution students against using the Detect Edges option in the Clipping Path dialog box for every image that requires a clipping path as this can add significant size and

complexity to a document. Photoshop is still the best option for most objects that require a clipping path.

Working with alpha channels

Pages 272–276: This lesson requires the use of Photoshop. If you are teaching a class that is focused on typography, you may want designate this lesson as optional. The features covered in this lesson help InDesign users understand that the preparation of an image in Photoshop impacts the ability to display a silhouette of the image in InDesign.

File formats

Page 277, 281–282: Although students work with .psd, .ai, and .pdf files in this lesson, you can use virtually any file format. InDesign supports formats such as .tif, .eps, and .jpg, to name a few. Native file formats (.psd and .ai) offer some advantages, such as the ability to work with a Photoshop file that includes clipping paths, alpha channels, and layers.

Creating a library

Page 285–286: As stated in the book, caution students about image linking in a library. If you add an imported graphic to a library and then copy the library item into a document, InDesign must still access the original graphic file when printing or exporting the document. If you embed a placed graphic (by selecting the graphic in the Links panel and then choosing Embed Link from the Links panel menu) and then drag the graphic frame into a Library panel, the graphic will be embedded in any document you later drag it into from the library.

Questions

- 1 Why is it important for links to graphic files to be maintained?
- 2 What is the benefit of a clipping path or alpha channel?

Answers

- 1 Because InDesign relies on the original source file for printing, most graphics will not print at the highest-possible resolution (nor will they export to PDF using the best-possible resolution) if the original graphic file can not be located.
- 2 Creating a clipping path or an alpha channel lets you control which portions of an image will print without deleting parts of the image. Clipping paths and alpha channels are most-often created using an image-editing program, such as Photoshop. If you import images with clipping paths or alpha channels into InDesign, you can print the image using any path or channel or you can ignore them and print the entire image.

Lesson 10: Creating Tables

Tables make it easier to present large amounts of data. Tables are created within text frames, and can be easily controlled through the Tables panel and the Table menu. You can also use the Control panel to manipulate tables. You can import tables from Excel and Microsoft Word, copy and paste a table into a layout, or convert existing text to a table.

Imported tables

Page 294–295: While importing tables created in Microsoft Word or Excel, you can specify which Excel sheet to import or choose a cell range or from a Microsoft Word document. You can maintain a link to these imported tables, but if you update them in the document, any formatting applied in InDesign will be lost.

Table formats

Page 296–298: You can format an entire table, including specifying formatting for alternating patterns of rows, and you can format individual or selected cells.

Table headers

Page 299–301: Tables can be linked across multiple text frames, and table headers appear at the top of each frame containing the table. You can have your more advanced students experiment with creating tables that span multiple text frames, and add table headers that appear in each frame.

Table panel

Page 302–303: While the Table panel provides a comprehensive set of options for creating and manipulating tables, you can also use the Control panel for many, but not all, of the options covered in this section. You may want to have your students learn the concepts with the Table panel and then let them experiment with the Control panel.

Graphics in table cells

Page 303–306: The only way to place graphics in tables is as inline (anchored) graphics. They need to be copied and pasted or imported into a cell when you have a text insertion point (blinking cursor).

Column width

Page 311–312: When dragging columns and row with the Type tool, holding down the Shift key will resize just the columns or rows affected, not the overall width or height of the table.

Questions

- 1 How are graphics imported into a table?
- 2 How do you easily select an entire row, a column or the entire table?
- 3 How do you add or delete rows and columns?

Answers

- 1 You can choose the Place command when the cursor is inserted in a table cell, or you can choose the Paste command after copying a graphic.
- 2 You can move your mouse to the outside portion of a row or column and click when the black arrow appears. You can also move your cursor to the upper left corner of a table and click when the arrow appears to select the entire table.
- 3 You can add or delete rows by entering a larger or smaller number in the rows or columns section of the Table panel. You can also choose the Insert or Delete commands from the Table panel menu.

Lesson 11: Working with Transparency

InDesign supports several see-through effects—referred to collectively as transparency. You can import Photoshop and Illustrator graphics that include transparency and add transparency to InDesign objects. This lesson shows some of the ways in which you can modify InDesign objects using the program’s built-in transparency features.

Colorizing grayscale images

Page 319–321: Note that you can apply color to black-and-white and grayscale images, and you can also colorize the background color (that is, the fill color) of graphics frames.

Opacity vs. tint

Pages 323–324: Specifying an opacity value and specifying a tint value are similar but different in one important way. When you apply a tint to an object’s fill or stroke, the fill or stroke gets lighter as the tint value gets lower. (A tint value of 0 makes the fill or stroke opaque white.) When you apply opacity to an object, the object gets lighter and translucent (that is, objects below are visible).

Layers

Students are instructed to turn layers on and off throughout this lesson. Make sure to have students follow the instructions closely. If they discover that they cannot

access something in the lesson because a layer is locked or hidden, instruct them go to the Layers panel and correct the problem.

Applying a gradient feather

Page 333: A gradient feather can be applied to objects in several ways. One of the easiest ways is to select an object, then select the Gradient Feather tool and drag across the object. You can then edit the effect in the Effects panel. Have students experiment with some of the other text and graphic objects on the page.

Applying effects to other objects

Page 337, step 11: Students may miss the mark when dragging the FX icon onto the other green semicircle. If they miss, it's easy to undo and try again.

Editing and removing effects

Page 338: Make sure that students realize that by using the Clear Effects button, all effects are removed, including transparency, blending modes, and opacity.

Questions

- 1 What is the advantage of applying effects using InDesign?
- 2 Why is it important for a page-layout program to support transparency?

Answers

- 1 You can avoid returning to Illustrator or Photoshop if you create transparency effects in InDesign. You can also create fully editable type, such as headlines, using drop shadows within InDesign. While you can achieve similar results in both Photoshop and Illustrator, this involves making the element and importing the graphic file into InDesign. If you need to change a transparency effect in a placed graphic, you must open the original file in the application used to create it, make changes, and then resave the file—considerably more work than creating and modifying the effect within InDesign.
- 2 Because transparent elements can be created using Photoshop and Illustrator, it is important that page layout programs understand how to handle these items. Images with feathered edges or pictures with transparent elements (such as a glass) can be successfully used only in a page layout program that supports transparency in placed graphics.

Lesson 12: Working with Long Documents

Long document features let you manage publications that consist of multiple documents, including updating page numbers and generating a table of contents

and index for the entire publication. In addition, InDesign can help you insert and format cross-references, footnotes, and cross-references.

Book panels

Pages 344–346: Explain that Book panels are somewhat like libraries—users create them as needed and add the content. In the case of Books, they add the InDesign documents that make up the publication.

Page numbering

Pages 346–347: Whether a book uses automatic, consecutive page numbering from start to finish or sophisticated sets of page numbers, the Book panel can ensure up-to-date page numbers as documents in the book are updated.

Text variables

Pages 348–351: In this lesson, a text variable is used to create a running footer on the pages. Variables, however, can be used for many purposes, including adding chapter numbers, running headers, and dates.

Footnotes

Pages 351–354: Tell students that they can import footnotes from Word files and that they have control over every aspect of formatting the footnote marker, the footnote placement, and the text.

Cross references

Pages 354–356: When referencing other pages in a publication, using automatic cross references ensure that the page numbers stay up to date as documents are edited and text reflows.

Synchronize formats

Page 356–359: Synchronize makes it easy to make global changes across all the documents in a book—for example, you can change a color swatch definition or a line width on a master page. You can select which documents to synchronize and what aspects to synchronize. Make students aware that once the synchronize takes place, it's difficult to undo.

Table of contents

Page 359–362: A table of contents is generated from text formatted with specific paragraph styles. As a result, the accuracy of the table of contents depends on the

proper application of styles. In addition, if documents are edited or text reflows after the table of contents is created, you will need to create it again.

Indexes

Page 363–368: This lesson introduces only the basics of creating index entries and generating a formatted index. In general, skilled indexers should tag text for an index.

Questions

- 1 Are index entries automatically updated?
- 2 How do you specify that a table of contents (TOC) and index will include all chapters in a book?
- 3 Why create a book?

Answers

- 1 Index entries are not automatically updated. You must add individual entries or use the add all option to have them added.
- 2 You must check the box in the Index panel for it to include book chapters. For you to include all book chapters in a TOC, use the checkbox in the TOC dialog box.
- 3 Books make it easy to work with longer documents and to make certain that styles and colors are defined consistently across multiple files.

Lesson 13: Output and Exporting

The primary destination for most InDesign files will be a printed publication. Whether this is a brochure, package design, or newsletter, you need to know how to print effectively and check the file for potential printing problems. A large and ever-growing number of print service providers accept InDesign files, and this chapter covers the tools for successfully printing with InDesign. You can also create PDF files for a variety of purposes—including distribution online and for press printing.

Using the Preflight panel

Pages 373–375: Preflighting a document is essential before handing-off a file for final output. In previous versions of InDesign, preflighting was performed at the end of the production cycle before a document was printed. The new Preflight panel in InDesign CS4 lets you perform live preflight throughout the production process, which allows you to identify and correct potential printing issues as soon as they occur. Whether you are delivering the file to a commercial printer or a colleague,

preflighting confirms that all assets necessary for printing or editing the document are available.

Using the Package command

Pages 376–377: In addition to collecting all of the files required to print an InDesign document, packaging a file is a great way to create an archived version of a document. Make sure that students understand that every time they package a file, they create copies of all of the imported graphic files, fonts, as well as the InDesign file. Once they've sent a package folder to the printer, they may want to delete the folder to avoid redundancy and save disk space, or they can make a copy of the folder on a different hard disk or CD before deleting the package folder from their hard disk.

PDF quality options

Pages 377–378: Note that there are a variety of settings that control the quality of the final PDF document. It is important to select a setting that matches your needs for the final PDF. A high quality PDF might be suitable for sending to a printer, but might be impractically large to post on-line. If students have questions on the PDF/X file options and you are unsure about how to answer them, you can find detailed information on the Adobe website. Go to www.adobe.com and search for PDF/X.

Separations Preview panel

Page 379–380: You can preview individual color separations, ink coverage limits, and overprinting using the Separations Preview panel, however, you cannot preview trapping, halftone screens, and resolution. You should work with your printer to verify these settings using integral or overlay proofs.

Printing a laser or inkjet proof

Pages 382–388: When working through this section, it is important to inform students who are not connected to a printer that they should choose either PostScript file from the Printer menu in the Print dialog box and a PPD other than Device Independent or choose an installed print driver to see all of the options.

Questions

- 1 How do you save your print settings?
- 2 How can you confirm what ink separations will print?
- 3 What are some of the advantages of InDesign's integrated PDF export?
- 4 Are all PDF files the same quality?

Answers

- 1 You can create a Print Preset by choosing Save Preset in the Print dialog box.
- 2 You can use the Separation Preview or use the Ink Manager.
- 3 Because you do not need to generate PostScript files and use Acrobat Distiller, the task of creating PDF files is simpler and faster. The integrated PDF export also provides for enhanced PDF options, such as the inclusion of multimedia elements (sounds and movies) and buttons that would otherwise not be possible.
- 4 You can choose from a number of preset options that determine the quality (and file size) of the resulting PDF file. There are high quality and low quality PDF options that are available, so all PDF files are not the same. In fact, you may need to export a PDF file multiple times if you intend to distribute the file online and also for high resolution printing.

Lesson 14: Creating Rich Interactive Documents

The option to export Adobe PDF files that include movies, sounds, and interactivity was available in previous versions of InDesign, and the features that support media-rich PDFs have changed little in InDesign CS4. However, the ability to export rich interactive documents as SWF files is new in InDesign CS4 and significantly expands the program's functionality.

Creating online documents

Pages 395–401. Make sure that students understand the difference between creating a media-rich document that is intended only for online use and creating a print document and exporting it as a PDF or SWF file as an alternative to the print version. Documents intended for online viewing only should take advantage of the medium by including multimedia objects (movies and sounds) and interactivity (buttons and hyperlinks). Documents designed for print won't include movies, sounds, and interactive elements.

An InDesign document that's intended to be viewed only online—whether it will be exported as PDF or SWF—will be different from a print document in several fundamental ways. For example, the size of an online document should be appropriate for a monitor. However, because monitors come in many different sizes, there are no dimensions that will produce optimal results on all monitors. Many designers of online documents design to the smallest standard monitor size (currently, the smallest standard monitor has a 15" diagonal and is 1024 x 768 pixels, which corresponds to a document size of 1024 x 768 points).

Exporting as Flash

Pages 401–402. Make sure that students understand that video and audio files placed into a document are not included in an SWF file exported from InDesign CS4. If you wish to include this kind of content in what will ultimately be a Flash (SWF) file, Adobe recommends using the export to Adobe Flash CS4 (XFL) workflow described in the following paragraph.

Inform students that in addition to exporting InDesign documents as SWF files, they can also choose the XFL file format when exporting. This new file format enables you to lay out content with InDesign and then import the XFL file into Adobe Flash CS4, where you can add video, audio, animation, and complex interactivity.

By default, when you export an SWF file, InDesign also creates an HTML file that includes an embedded copy of the SWF file. This HTML file can be viewed using any browser. However, the viewing experience is better when the exported SWF file is opened with Adobe Flash Player or Adobe Flash CS4. If Adobe Flash CS4 is not available on students' computers, you should download and install the free Adobe Flash Player application and use it to open and view the exported SWF file.

PDF export options

Pages 401–402. The Export Adobe PDF dialog box provides many options for controlling the size and functionality of an exported PDF file. The settings you specify for documents that contain movies, sounds, and buttons are different than the settings you would use for documents that do not contain multimedia and interactivity. Note that if you select any of the built-in Adobe PDF presets, interactive elements are not automatically included. You must select these options from the Include section of the General panel of the Export Adobe PDF dialog box. If you intend to create media-rich documents frequently, you should save your PDF export settings as a PDF preset by selecting Save Preset in the Export Adobe PDF dialog box.

Questions

- 1 What transparency blend space should you choose (Edit > Transparency Blend Space) for documents that are intended for online viewing only?
- 2 What panel do you use to specify the functionality of a button?
- 3 When you export an SWF file from InDesign CS4, a point (1/72 of an inch) in the InDesign file is equal to what in the SWF file?
- 4 What programs can you use to open an SWF file?

Answers

- 1 Document RGB.
- 2 The Buttons panel (Window > Buttons).
- 3 A pixel.
- 4 Adobe Flash Player or Adobe Flash CS4 Professional.