# Adobe InDesign

2026 Release




## Classroom in a Book®

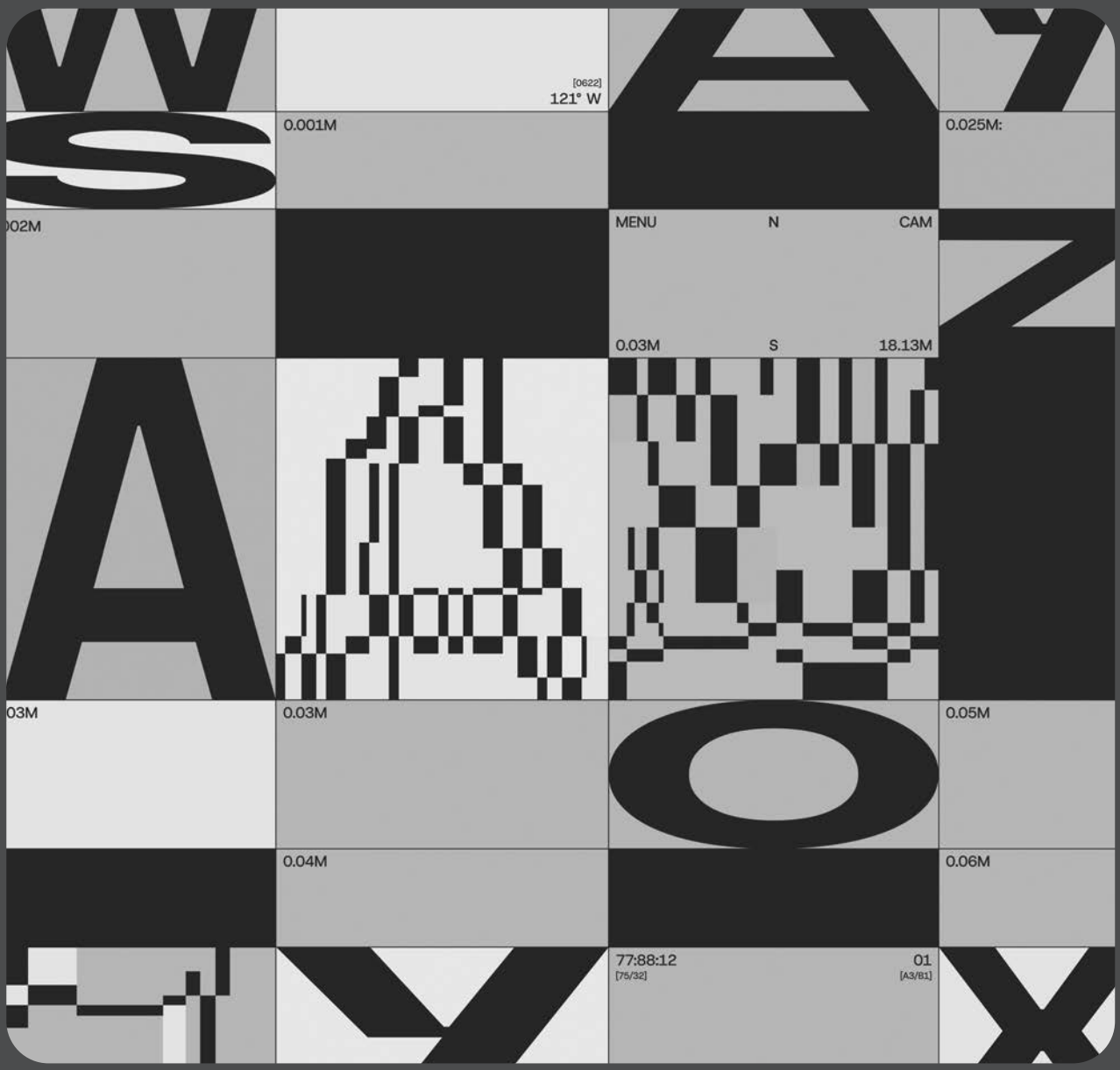
The official training workbook from Adobe

Kelly Kordes Anton & Tina DeJarld

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# Adobe InDesign

**2026 Release**




# Classroom in a Book®

**The official training workbook from Adobe**

Kelly Kordes Anton & Tina DeJarld

Adobe InDesign Classroom in a Book® 2026 Release

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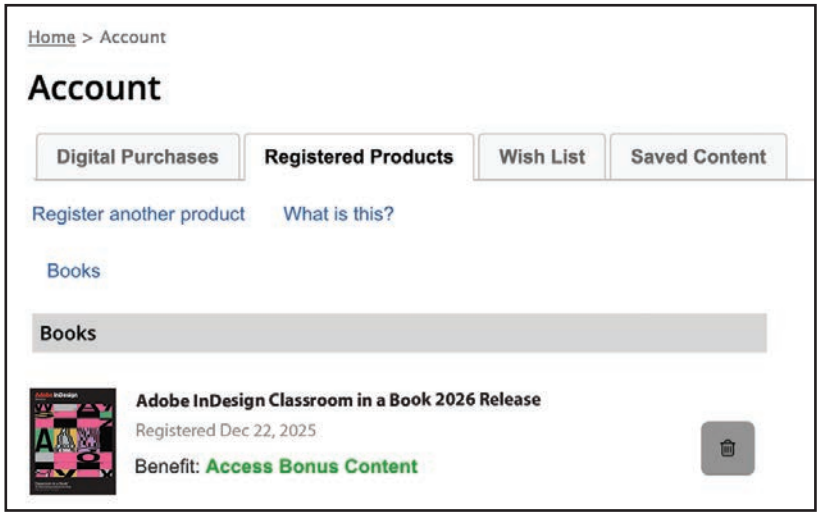
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# CONTENTS


GETTING STARTED 1

About Classroom in a Book . . . . . 1
Prerequisites . . . . . 2
Installing the software . . . . . 2
Online content . . . . . 3
Saving and restoring the InDesign Defaults file . . . . . 4
Training resources . . . . . 5

1 INTRODUCING THE WORKSPACE 6




Getting started . . . . . 8
Reviewing and customizing the work area . . . . . 9
Selecting and using tools . . . . . 12
Working with panels . . . . . 17
Reviewing the document window and pasteboard . . . . . 23
Navigating through a document . . . . . 25
Exploring on your own . . . . . 30

2 GETTING TO KNOW INDESIGN 32




Getting started . . . . . 34
Viewing guides . . . . . 35
Adding text . . . . . 36
Working with styles . . . . . 39
Importing graphics . . . . . 43
Adding a graphic with a text prompt . . . . . 45
Working with objects . . . . . 46
Working with object styles . . . . . 49
Preflighting as you work . . . . . 49
Viewing the document in Presentation mode . . . . . 51
Exploring on your own . . . . . 51

## 3 SETTING UP A DOCUMENT AND WORKING WITH PAGES 54




Getting started . . . . . 56
Creating a new document. . . . . 57
Creating and saving custom document settings . . . . . 58
Creating a new document from a preset . . . . . 59
Working with parent pages . . . . . 60
Applying parent pages to document pages . . . . . 69
Adding new document pages . . . . . 70
Rearranging and deleting document pages. . . . . 70
Changing the size of pages within the same document . . . . . 71
Adding sections to change page numbering. . . . . 72
Printing to the edge of the paper: Using the bleed guides . . . 77
Rotating spreads for easier editing . . . . . 79
Exploring on your own. . . . . 81

## 4 WORKING WITH OBJECTS 84




Getting started . . . . . 86
Introducing layers . . . . . 87
Working with layers. . . . . 90
Transforming the shape of frames . . . . . 93
Using the History panel . . . . . 98
Creating and modifying graphics frames . . . . . 99
Adding metadata captions to graphics frames . . . . . 105
Wrapping text around a graphic. . . . . 106
Transforming and aligning objects . . . . . 108
Selecting and modifying grouped objects . . . . . 116
Flowing type along a path . . . . . 118
Drawing lines and adding arrowheads. . . . . 119
Responsive design: Using flex containers . . . . . 121
Exploring on your own. . . . . 128

## 5 WORKING WITH COLOR 130




Getting started .....132
Managing color.....133
Defining printing requirements .....137
Creating colors .....139
Applying colors.....145
Finding and changing color swatches .....149
Working with tint swatches .....150
Working with gradients.....152
Working with color groups.....155
Exploring on your own.....156

## 6 FLOWING TEXT 162




Getting started .....164
Flowing text into an existing frame .....165
Flowing text manually .....168
Creating frames while flowing text .....170
Creating threaded frames automatically.....171
Flowing text automatically.....173
Using Find/Change to delete extra paragraph returns.....176
Applying paragraph styles to text .....177
Adjusting columns.....179
Using the baseline grid to align text.....181
Adding a jump line page number .....185
Exploring on your own.....186

## 7 EDITING TEXT 188



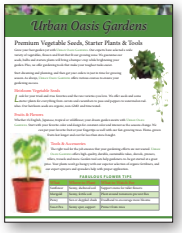
Getting started .....190
Editing and importing text.....191
Finding and changing text and formatting.....193
Checking spelling.....198
Using the Story Editor.....201
Tracking changes and adding notes .....202
Exploring on your own.....203

## 8 WORKING WITH TYPOGRAPHY 206


A BITE OF DELIGHT
Strawberries
"You bland out like a strawberry in a bowl of peas."

Getting started ..... 208
Adjusting vertical spacing ..... 209
Working with fonts, type styles, and glyphs ..... 211
Working with columns ..... 218
Changing paragraph alignment ..... 220
Creating a drop cap ..... 222
Adjusting letter and word spacing ..... 223
Adjusting line breaks ..... 225
Setting tabs ..... 228
Working with paragraph shading and rules ..... 232
Exploring on your own ..... 234

## 9 WORKING WITH STYLES 236


Urban Oasis Gardens
Premium Vegetable Seeds, Starter Plants & Tools

Getting started ..... 238
Creating and applying object styles ..... 241
Creating and applying paragraph styles ..... 244
Creating and applying character styles ..... 248
Nesting character styles inside paragraph styles ..... 251
Creating and applying table and cell styles ..... 255
Globally updating styles ..... 260
Loading styles from another document ..... 262
Exploring on your own ..... 266

## 10 CREATING TABLES 268


Urban Oasis Gardens
class schedule

Getting started ..... 270
Working with tables ..... 271
Creating a table and entering data ..... 271
Converting text to a table ..... 272
Importing a table ..... 273
Changing rows and columns ..... 275
Formatting a table ..... 280
Anchoring graphics in table cells ..... 284
Creating a header row ..... 285
Creating and applying table and cell styles ..... 285
Fine-tuning a table ..... 287
Exploring on your own ..... 288

**11 IMPORTING AND MODIFYING GRAPHICS 290**




Getting started . . . . . 292
Adding graphics from other programs . . . . . 293
Comparing vector and pixel-based graphics . . . . . 293
Managing links to imported files . . . . . 294
Updating revised graphics . . . . . 297
Adjusting display quality . . . . . 299
Importing and sizing graphics . . . . . 300
Editing placed pictures . . . . . 305
Working with dropped backgrounds . . . . . 306
Importing native Adobe graphic files . . . . . 310
Using Subject-Aware Text Wrap . . . . . 317
Filling type with a graphic . . . . . 319
Using an InDesign library to manage objects . . . . . 320
Using generative AI features in InDesign . . . . . 324
Exploring on your own . . . . . 328

**12 WORKING WITH TRANSPARENCY 330**




Getting started . . . . . 332
Creating a background graphic . . . . . 333
Applying transparency settings . . . . . 335
Adding transparency effects to imported vector and bitmap graphics . . . . . 338
Importing and adjusting Illustrator files that use transparency . . . . . 341
Applying transparency settings to text . . . . . 342
Working with effects . . . . . 344
Exploring on your own . . . . . 356

**13 PRINTING AND EXPORTING 358**




Getting started . . . . . 360
Preflighting files . . . . . 360
Previewing separations . . . . . 364
Managing colors . . . . . 366
Previewing the pages . . . . . 370
Creating an Adobe PDF proof . . . . . 371

Creating a press-ready PDF and saving a PDF preset .....372
Printing a proof and saving a print preset.....375
Packaging files .....378
Exporting graphics for the web and other digital destinations .....380
Exporting pages for email, social media, or web banners ...383
Exploring on your own.....386

**14 INDESIGN AND ACROBAT** **388**




Getting started .....390
Setting up a workspace for interactive PDF .....391
Understanding interactive PDFs.....393
Adding hyperlinks .....393
Creating navigation buttons .....401
Creating a table of contents that updates automatically....402
Creating a form field for notes.....406
Creating a popup .....408
Adding a video .....412
Making changes to an interactive PDF file .....414
Exporting a final interactive PDF file.....420
Testing an interactive PDF in Adobe Acrobat Reader .....421
Using Open PDF .....422
Exploring on your own.....426

**INDEX** **428**

# 2 GETTING TO KNOW INDESIGN

## Lesson overview

In this lesson, you'll learn how to do the following:

- View layout aids.
- Type and style text.
- Import text and thread text frames.
- Import a graphic.
- Use AI to add a graphic based on a prompt.
- Move, rotate, fill, and stroke (outline) an object.
- Add a QR code.
- Automate formatting with paragraph, character, and object styles.
- Check on potential production issues with the Preflight panel.
- Preview a document in Presentation mode.



This lesson will take about 60 minutes to complete. To get the lesson files used in this chapter, refer to the instructions in "Accessing the lesson files and Web Edition" in the "Getting Started" section at the beginning of this book.

# edible blossoms

## Bistro & Bar

Relax in our elegant dining room or charming patio and enjoy the creations of our bartender, chef and gardener! Our irresistible appetizers, seasonal entrées and home-made desserts feature fruits, flowers and herbs grown right here in our stunning Urban Oasis Gardens.

### Starters & Small Plates

Sip a rosé martini, try zucchini blossom fritters *(V)* or braised dandelion greens *(V, GF)* for appetizers, and share small plates such as orange ginger seared scallops or chive flower flatbread.

### Entrées & Desserts

Indulge in our chef's daily creations, such as lavender honey grilled chicken or fresh basil pesto *(V)* and be sure to leave room for scrumptious violet macarons or candied pansies *(V, GF)*.







*See the full menu!*

The building blocks of an Adobe InDesign layout are objects, text, and graphics. Layout aids such as guides help with size and placement, and styles let you format page elements automatically.

# Getting started

The document for this lesson is a standard-size postcard designed to be printed and mailed. In addition, the postcard can be exported as a JPEG to use in email marketing and social media. The postcard is landscape orientation, but it can be converted to a portrait layout for other media via InDesign features such as Create Alternate Layout, Liquid Layout, and Flex Layout. As you will see in this lesson, the building blocks of an InDesign document are essentially the same, regardless of the output media. In this lesson, you will add the text, images, and formatting necessary to finish the postcard.

**Note:** If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

1. To ensure that the preferences and default settings of your Adobe InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on page 4.
2. Start InDesign.
3. When the InDesign Home screen displays, click the Open button at the left. (If the Home screen does not display, choose File > Open from the InDesign menu bar.)
4. Open the 02_Start.indd file in the Lesson02 folder, located inside the Lessons folder within the InDesignCIB folder on your hard drive.
5. If an alert informs you that the document contains links to sources that have been modified, click Update Modified Links.
6. Choose File > Save As, click Save On Your Computer if necessary, rename the file **02_Postcard.indd**, and save it in the Lesson02 folder.

**Note:** To better view the interface onscreen or in print, the screen captures in this book reflect the Medium Light interface rather than the default setting of Medium Dark. In addition, some screen captures illustrate User Interface Scaling for a closer look at interface elements. You can modify interface settings in Preferences.

7. This lesson uses the default Essentials workspace. If necessary, choose Window > Workspace > [Essentials], and then choose Window > Workspace > Reset Essentials. Choose Window > Contextual Task Bar to save space onscreen.
8. If you want to see what the finished document looks like, open the 02_End.indd file in the same folder. (Note that your final document may look slightly different due to varying Text To Image AI results.) You can leave this document open to act as a guide as you work.

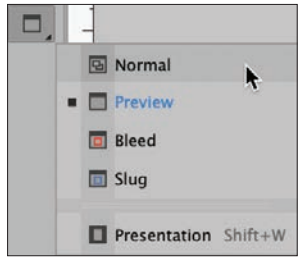



9. When you're ready to resume working on the lesson document, display it by clicking its tab in the upper-left corner of the document window.

# Viewing guides

Revising or completing an existing document, as you will do in this lesson, is typical work for entry-level InDesign users. Currently, the postcard document is displayed in Preview mode, which displays artwork in a standard window, hiding nonprinting elements such as guides, grids, frame edges, and hidden characters. To work on this document, you will view guides and hidden characters (such as spaces and tabs).

1 Click and hold down the Screen Mode button at the bottom of the Tools panel, and choose Normal ( ) from the menu.



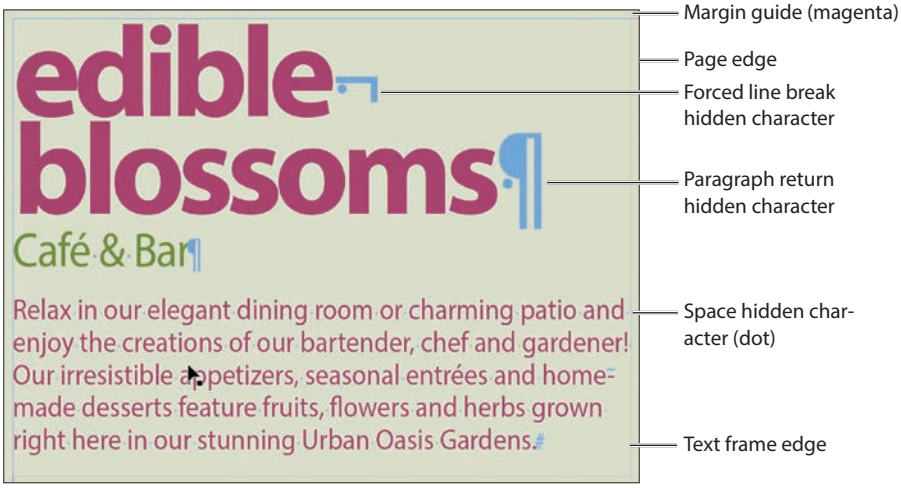

Any layout aids previously turned on now display. For example, light blue nonprinting lines now indicate existing text frames and objects because frame edges were already displayed (View > Extras > Show Frame Edges). You will now enable other layout aids.

2 Choose View > Grids & Guides > Show Guides.

When guides are displayed, it's easy to position objects with precision, including automatically snapping text frames and graphics frames into place. The guides do not print and do not indicate the print or export area.

3 Choose Type > Show Hidden Characters.

Displaying hidden (nonprinting) characters—such as tabs, spaces, and paragraph returns—helps you precisely select and style text. In general, it's a good idea to show hidden characters whenever you are editing or formatting text.




4 As you work on this document, use the skills you learned in Lesson 1, "Introducing the Interface," to move panels, scroll, and zoom as necessary.

**Tip:** The lesson document starts out in Preview Mode and then you switch to Normal Mode. The other modes are Bleed, for reviewing the predefined bleed area for objects that extend beyond the page boundaries; Slug, for displaying the area outside the bleed area that can contain information such as printer instructions; and Presentation, which fills the screen and works well for presenting design ideas to clients.

**Tip:** As you become comfortable working with InDesign, you will discover which screen modes and layout aids work best for you.

# Adding text

**Tip:** Use the Type tool to edit text, format text, and create new text frames.

With InDesign, most text is contained in a text frame. (Text can be contained in table cells and flow along paths as well.) You can type text directly into a text frame or import text files from word-processing programs. When importing text files, you can add the text to existing frames or create new frames to contain the text. If text doesn't fit within a single frame, you can link multiple text frames using a process called "threading." You will learn more about flowing text, including dividing text frames into columns, in Lesson 6, "Flowing Text."

## Typing and styling text

You're ready to start working on the incomplete postcard. To get started, you'll edit and style the text under the main headline.

1. Select the Type tool (T), and click immediately after the word "Café."
2. Press Backspace (Windows) or Delete (macOS) four times to delete the word "Café."

**Tip:** When you enter edits, consider copying and pasting text from the notes in Acrobat or InDesign to ensure that you don't introduce typographical errors.

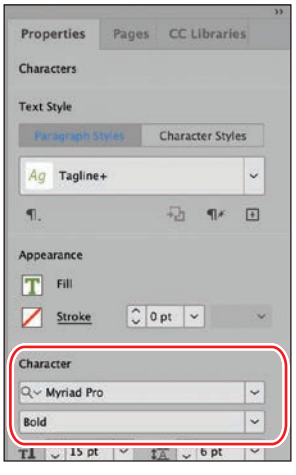
3. Type **Bistro** in the text frame so that the restaurant's descriptor is changed from "Café & Bar" to "Bistro & Bar."




4. With the insertion point still in the text, triple-click to select "Bistro & Bar."

**Tip:** When you apply bold or italic formatting in InDesign, you are actually applying a variation of the font, which you select from a menu. Depending on the font, you may have various choices such as extra bold or bold italic. As a result, InDesign and other professional publishing applications do not provide a simple bold or italic button for applying these styles.

5. Locate the Character controls of the Properties panel at the right. From the Font Style menu, select Bold.






6 Click outside the text frame to deselect the text.

7 Choose File > Save to save your work.

## Options for styling and placing text

In the Essentials workspace, the Properties panel displays at the right to provide quick access to the most common text formatting options. InDesign provides other options for formatting characters and paragraphs and for positioning text within a frame. Common text formatting options include:

- **Character formats:** Style, Size, Leading (line spacing), All Caps
- **Paragraph formats:** Alignments such as Center, Indents, Space Before/After
- **Text Frame Options:** Columns, Inset Spacing, Vertical Justification

The Control panel, Paragraph panel (Type > Paragraph), and Character panel (Type > Character) provide all the controls you need to style text. To control the positioning of the text within its frame, such as dividing text into columns, choose Object > Text Frame Options. Many of these styling options also are available in the Control panel (Window > Control or Window > Workspace > Advanced).

## Importing and flowing text

In most publishing workflows, writers and editors use word processors such as Adobe InCopy, Microsoft Word, or Google Docs. When the text is almost final, they send the files to graphic designers. To complete the postcard, you will import a Word file into a text frame at the bottom of the page using the Place command. You will then thread (link) the first text frame to the second frame. All the text in a series of threaded text frames is called a "story."

1 Using the Selection tool ( ), click a blank area of the pasteboard to make sure no objects are selected. (Scroll to the right or left as needed to see the pasteboard.)

2 Choose File > Place. At the bottom of the Place dialog, make sure that Show Import Options is not selected. (On macOS, click Show Options if necessary to see the Show Import Options checkbox.)

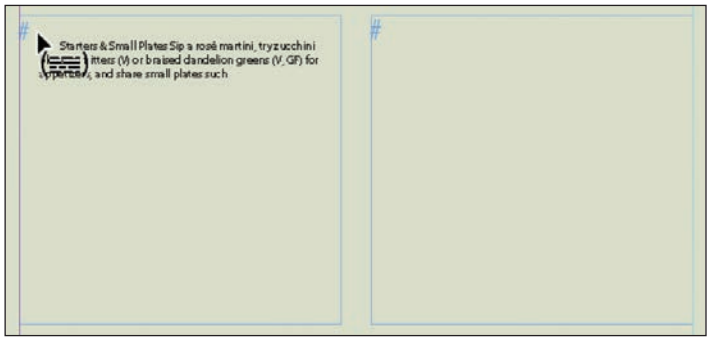
3 Navigate to the Lesson02 folder in the Lessons folder, and double-click the Bistro.docx file.

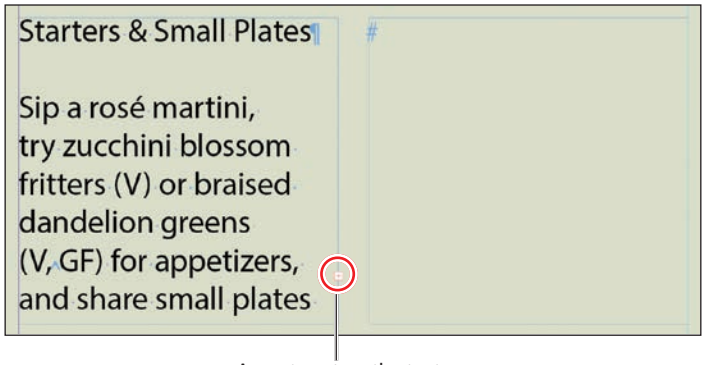
The pointer changes to a loaded text icon ( ). You'll add this text to the text frame in the lower-left quadrant of the postcard. (The text frames are outlined by light blue nonprinting lines.)

**Note:** To see where to place the text, view the finished lesson document, 02_End.indd.

**Tip:** When the loaded text icon is displayed, you have several choices: You can drag to create a new text frame, click inside an existing frame, or click to create a new text frame within the page's column guides.

4 Position the loaded text icon in the text frame, and then click.





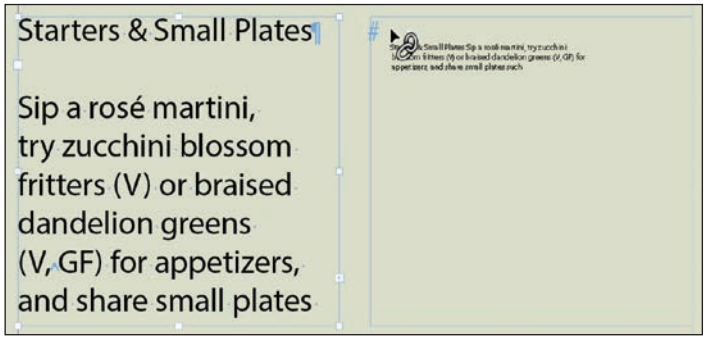

An out port on the text frame; the red plus sign indicates overset text.

The text in the Word file fills the frame, but it may not all fit. A red plus sign (+) in the out port of the frame (in the frame's lower-right corner) indicates overset text. You will thread the two bottom text frames so that the text flows through them.

**Tip:** You can create columns by threading individual text frames or by dividing text frames into multiple columns using the General tab of the Text Frame Options dialog (Object menu). Some designers prefer to create columns using separate text frames for more layout flexibility.

5 Using the Selection tool, select the text frame that now contains the text.

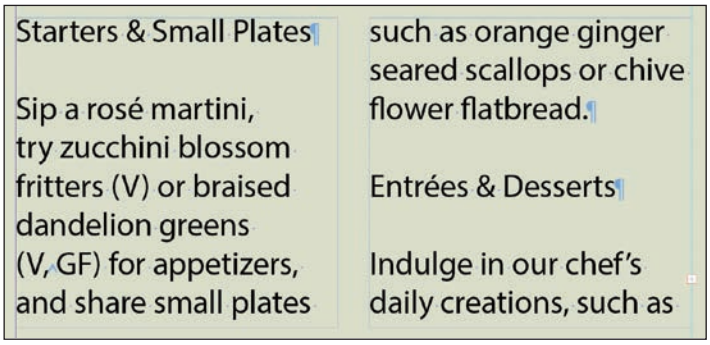
6 Click the out port (+) of the selected frame to display the loaded text icon. Click in the text frame immediately to the right.



At this point, text likely remains overset. You will resolve this problem by formatting the text with styles later in this lesson.

**Note:** Due to variations in font versions, you may see slightly different text in your frames.

7 Choose Edit > Deselect All, and then choose File > Save.

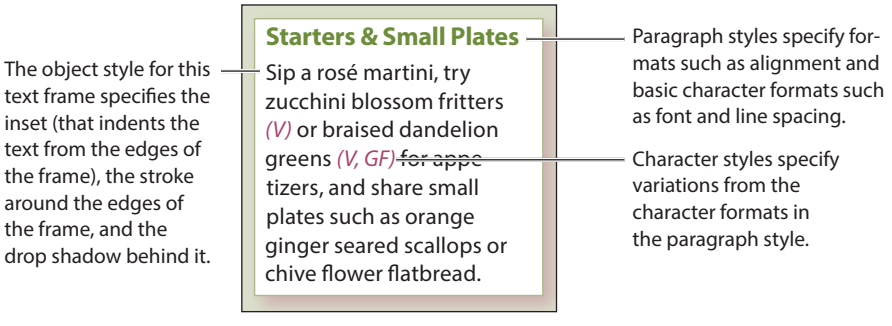



## Working with styles

InDesign provides paragraph styles, character styles, and object styles for quickly and consistently formatting text and objects. Another significant reason to use styles is that you can make global changes—such as changing the body text font or adjusting drop shadows—by simply editing the style. This can save you hours in making revisions to long documents such as books. Styles work as follows:

**Tip:** A paragraph style can include nested styles that format the beginning of a paragraph and lines within a paragraph. This automates common paragraph formatting, such as starting a paragraph with a drop cap followed by all capital letters on the first line.

- A paragraph style includes all text formatting attributes—such as font, size, and alignment—and it applies to all the text in a paragraph. You can select a paragraph for formatting by clicking in it, highlighting any part of it, or highlighting all of it.
- A character style includes only character attributes—such as font style (bold or italic) and color—and it applies only to selected text within a paragraph. Character styles are generally applied to call attention to specific text within a paragraph.
- An object style lets you apply formatting—such as fill and stroke color, stroke styles and corner effects, transparency, drop shadows, feathering, text frame options, and text wrap—to selected objects.

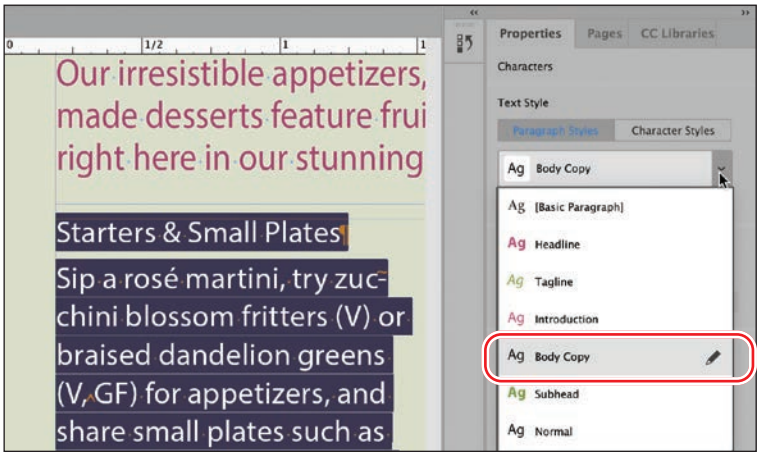


## Applying paragraph styles

**Tip:** In many publishing environments, including marketing and advertising, the text in a publication is referred to as "copy," which is why the writers and editors are called "copywriters" and "copyeditors."

Because the postcard is part of a series, all the paragraph styles you need are already created. You will first apply the Body Copy style to all the text in the two threaded text frames, and then you will apply the Subhead style to the headings.

1. Using the Type tool (T), click in one of the text frames containing the newly imported text.
2. Choose Edit > Select All to select all the text in the story.
3. Click the Paragraph Styles button at the top of the Properties panel. Click the Paragraph Styles menu and select the Body Copy style to format the entire story.




**Note:** If a plus sign (+) displays next to the applied style (Body Copy or Subhead), it indicates that the text formatting does not precisely match the style's formatting. To resolve this, click Clear Overrides (¶✶) at the bottom of the Paragraph Styles panel. You will learn more about styles in Lesson 9, "Working with Styles."

4. Using the Type tool, click in the first line of text in the story: "Starters & Small Plates."

   As you can see from the hidden character (the paragraph return) at the end of the line, this line is actually its own paragraph. Therefore, it can be formatted with a paragraph style.
5. Select the Subhead style from the Paragraph Styles menu in the Properties panel.
6. Apply the Subhead paragraph style to the "Entrées & Desserts" subhead as well.
7. Choose Edit > Deselect All, and then choose File > Save. (The Deselect All command is about halfway down the Edit menu.)

## Formatting text for the character style

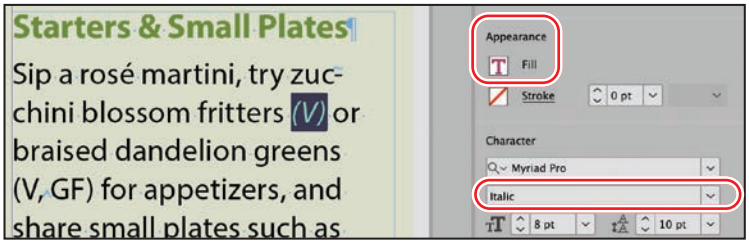
Highlighting key words in a paragraph can draw readers into the text. For the postcard copy, you will format the abbreviations for vegetarian foods (V) and gluten-free foods (GF) to make them "pop" and then create a character style based on that formatting. You can then quickly apply the character style to other selected words.

1 Using the Zoom tool (), zoom in on the first text frame in the lower-left quadrant of the postcard. This frame contains the subhead "Starters & Small Plates."

2 Using the Type tool (), select the "(V)" in the first paragraph of body copy; be sure to select both parentheses as well.

3 In the Character controls of the Properties panel at the right, select Italic from the Type Style menu.

4 Click the Fill box () to display the document's color swatches. Click the red swatch named Red-Bright to apply the color to the text.




5 Click the pasteboard to deselect the text and view your changes.

6 Choose File > Save.

## Creating and applying a character style

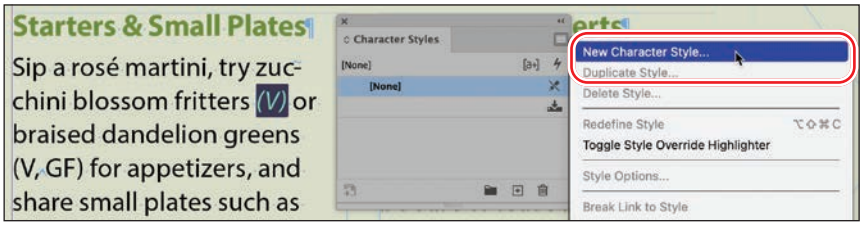
Now that you have formatted the text, you are ready to create a character style based on that formatting.

1 Using the Type tool (), select the newly formatted "(V)."

2 Choose Type > Character Styles to display the Character Styles panel. Tear off the panel if it's easier for you to access.

3 Select New Character Style from the panel menu ().

▶ **Tip:** Using the Type tool, you can double-click to select a word, triple-click to select a line, and click four times to select a paragraph.

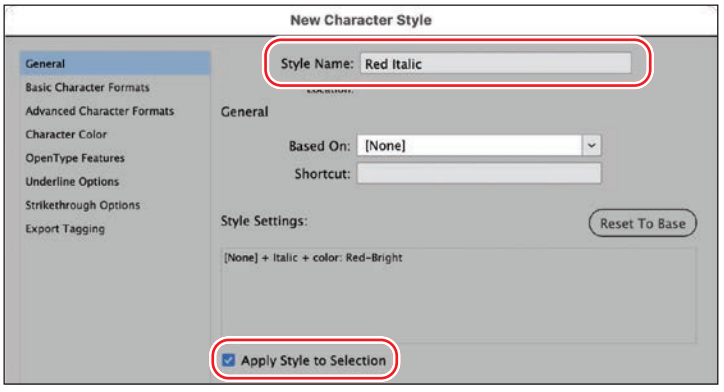


**Note:** If the New Character Style dialog does not open immediately, double-click Character Style 1 in the Character Styles panel.

The New Character Style dialog opens with a new style named Character Style 1. This new style includes the characteristics of the selected text, as indicated in the Style Settings area of the dialog.

4 In the Style Name field, replace the default name (Character Style 1) with **Red Italic**.

5 Below the Style Settings in the New Character Style dialog, select Apply Style To Selection.




6 Click OK.

7 Using the Type tool, select the "(V, GF)" later in the first paragraph.

8 Click Red Italic in the Character Styles panel.

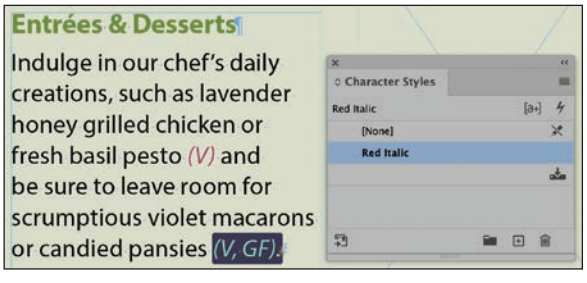
Because you applied a character style instead of a paragraph style, the formatting affected only the selected text, not the entire paragraph.

**Tip:** Typesetters often apply the same style to any punctuation following text formatted with a different style. (For example, if a word is italicized, you would italicize a comma after it.) This may vary based on design preferences or a publisher's style guide. The key is to be consistent.

9 Using the Type tool, select the "(V)" next to "fresh basil pesto" in the text frame at the right.

10 Click Red Italic in the Character Styles panel.

11 Repeat the process to apply the Red Italic character style to the "(V, GF)" and the trailing period at the end of the paragraph.




12 Choose Type > Character Styles to close the panel, click on the pasteboard surrounding the page to deselect the text, and then choose File > Save.

# Importing graphics

To add one of the final design elements to the postcard, you'll import, resize, and position a graphic. In InDesign, graphics are placed inside frames, and the Selection tool ( ) allows you to resize the graphics frame and to position the graphic within the frame. You will learn more about working with graphics in Lesson 11, "Importing and Modifying Graphics."

**Tip:** You can place a graphic into an existing frame or create a new frame as you place the graphic. You can also drag graphic files from your computer's desktop onto an InDesign page or pasteboard.

1 Choose View > Fit Page In Window.

You will position the graphic in the upper-right quadrant of the postcard.

2 Make sure that no objects are selected by choosing Edit > Deselect All.

3 Click the Import File button, the last option on the Properties panel at the right. In the Place dialog, make sure that Show Import Options is not selected.

4 Navigate to the Lesson02 folder in the Lessons folder, and double-click the DiningRoom.jpg file.

The loaded graphics icon ( ) displays a preview of the graphic. If you click the page, InDesign places the graphic at full size, inside an identically sized graphics frame. In this case, however, you will scale the graphic as you add it to the page. The resulting graphics frame will have the same dimensions as the graphic. The graphic will be placed in the upper-right quadrant of the postcard.

5 Position the loaded graphics icon at the intersection of the light blue and pink guides as shown. If necessary, consult the finished lesson document, 02_End.indd, to see where to place the graphic.

6 Drag down and to the right until the pointer touches the guide on the right side of the page.






When you release the mouse button, the graphic is added to the page, and a graphics frame is created automatically.

You will now experiment with cropping a graphic by decreasing the size of the frame, and you will try moving the graphic within the frame. You will undo these changes.

**Tip:** When you create a frame while placing a graphic on the page, the graphic is automatically scaled to fit within the frame. Use the scaling controls in the Properties panel and the Control panel to precisely adjust the graphic size. You will learn more about sizing in Lesson 11.

7 Using the Selection tool ( ), select the middle handle at the top of the graphics frame and drag it down. You can crop the image by dragging any of its eight resizing handles.




Use the Selection tool to crop a graphic by reducing the size of its frame.

8 Press Ctrl+Z (Windows) or Command+Z (macOS) to undo the crop.

9 Still using the Selection tool, position the pointer over the graphic to display the content grabber ( ) in the center of the graphic.

10 Click the content grabber to select the graphic, and then drag up to position the image within the frame as you please.

**Tip:** To reposition a graphic with more control, press the Shift key while dragging. This constrains the movement to horizontal, vertical, and 45-degree angles. Click and pause briefly before moving the graphic within a frame to see the cropped part of the graphic ghosted but visible outside the frame area.



Drag the content grabber to position the graphic inside the frame.

11 Press Ctrl+Z/Command+Z to undo the image move. The eventual position of the graphic should be where you placed it in step 6.

12 Choose Edit > Deselect All, and then choose File > Save.

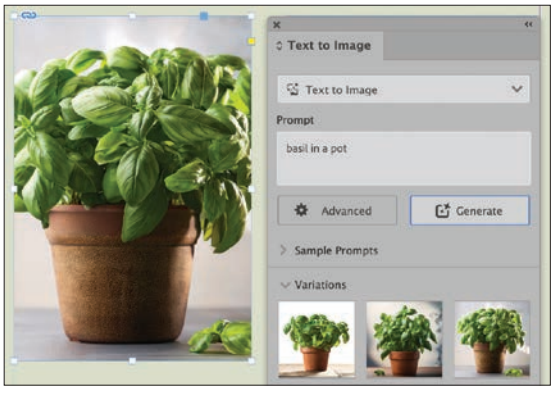
# Adding a graphic with a text prompt

The InDesign Text To Image feature uses artificial intelligence (AI) to generate a high-resolution, royalty-free image based on text prompts you enter. The ability to generate an image within InDesign is helpful for creating mockups before assigning photography or searching a stock photo service. If a project does not require specific images, the generated images may be used in final projects as well. In the following steps, you will select an existing graphics frame, enter a text prompt, and select from the generated images.

1 The Text To Image feature involves Creative Cloud processing, so be sure the computer is connected to the internet during this exercise.

2 Zoom in on the lower-right corner of the postcard, where you will see an empty graphics frame (indicated by a nonprinting outline and an x inside the frame).

3 Using the Selection tool ( ), select the graphics frame and choose Window > Text To Image. At the top of the panel, select Text To Image from the menu




4 In the Prompt field of the Text To Image panel, type **basil plant in a pot** in the field, and then click Generate. (If an alert displays at this point, click OK.)

After you click Generate, the first generated image is placed in the graphics frame. Because the graphics frame was selected, InDesign generated options to work within the frame.

5 The Text To Image panel opens automatically, providing other image options and sizes.

- Click other options in the Variations area of the Text To Image panel. If necessary, click the arrow next to Variations to view the area.
- To see more variations in generated images, you can click Generate again or revise the text.

6 Select the image you prefer with the layout. The image shown here may not be an option.

7 Choose Window > Text To Image to close the panel.

8 Choose Edit > Deselect All, and then choose File > Save.

**Tip:** The Text To Image AI feature is constantly being fine-tuned based on user feedback. You will see different results each time you use the feature. More specific prompts should generate more relevant images.

**Tip:** To place an image from the Text To Image panel without a text frame selected, point at the image, click the More Options button ( ), and select Place Variation. Use the loaded graphics icon ( ) to place the image.

# Working with objects

**Tip:** You will learn more about objects in Lesson 4, "Working with Objects."

The building blocks of InDesign pages are objects: text frames, graphics frames, lines, and more. In general, you move and resize objects with the Selection tool. Objects can have a fill color (background color) and a stroke color (outline or border), which you can customize by specifying the width and style. You can move objects around freely, snap them to other objects, and place them with precision according to guides or values you enter. In addition, you can resize and scale objects and specify how text wraps around them. Here, you will experiment with a few object-related features, including adding a QR code for easy web access.

## Moving and rotating an object

A flower graphic created by converting flower characters from the Zapf Dingbats font into outlines (Type > Create Outlines) was created on the pasteboard to the left of the page. You will move this graphic to the right of the restaurant name, "edible blossoms." Then, you will rotate the object and adjust its placement.

1. Choose View > Fit Page In Window to center the page in the document window. Scroll left to see the flower graphic on the pasteboard.
2. To better focus on the objects, choose Type > Hide Hidden Characters and choose Windows > Workspace > Reset Essentials.
3. Using the Selection tool ( ), click the flower graphic.
4. Drag the graphic to the right of the headline, "edible blossoms."

   With the object still selected, you will fine-tune the placement using the Properties panel.




**Tip:** When you enter values in the Properties panel or Control panel X and Y fields, the object is repositioned according to its reference point. You can view and change the reference point ( ) by clicking a box immediately to the left of the X and Y fields.

5. In the Transform controls of the Properties panel, click the More Options button ( ) if necessary. To specify the object's placement in relation to its reference point (upper-left corner), type the following values in the fields:

   X: **1.85 in**

   Y: **.05 in**

   Rotation angle ( ): **–10**

You can tab between the fields, and then press Enter (Windows) or Return (macOS) to apply the changes.




6 Choose File > Save.

## Changing an object's stroke and fill

When an object is selected, you can change its stroke (outline or border) weight and color. In addition, you can apply a fill (background) color.

1 Choose Edit > Deselect All to make sure nothing is selected.

2 Click the Direct Selection tool ( ) on the Tools panel, and then click the white flower in the graphic to select it.

3 In the Appearance controls of the Properties panel, click the Fill box ( ) to display the document's swatches. Click the Green-Dark swatch.

**Note:** The flower graphic is a group of objects. The Direct Selection tool lets you select a single object within a group. You can also select a single object in a group by double-clicking it with the Selection tool.




4 Press the V key on the keyboard to switch to the Selection tool ( ). Click to select the black horizontal line at the bottom of the page.

5 In the Appearance controls of the Properties panel, click the Stroke box ( ) to display the document's swatches. Click the Green-Medium swatch.




6 Click the pasteboard to deselect all objects.

7 Choose File > Save.

## Adding a QR Code

Consumers often expect advertising pieces to include a QR code so they can quickly visit a website for more information. The code is a graphic (generated by InDesign) that is inside a graphics frame. Here, you will add a QR code below the "See the full menu!" text in the lower-middle part of the postcard.

1 Zoom in as necessary to view the lower-right corner of the postcard.

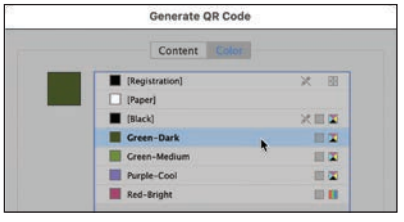
2 Choose Object > Generate QR Code.

**Note:** Because the postcard in this lesson is for a fictional restaurant, you will create a QR code to the main Adobe website. When creating your own designs, you may type or paste any URL in the Content field.

3 On the Content tab of the Generate QR Code dialog, leave the Type setting at Plain Text. Type **https://www.adobe.com** in the Content field.

4 Click the Color tab, and then select Green-Dark in the list of swatches. This creates a QR code that matches the color theme of the postcard.




5 Click OK to load the pointer with the QR code. Drag the pointer below the "See the full menu!" text to place the QR code. Keep the graphics frame selected so you can fine-tune its placement.

**Note:** Remember, you can tab between the fields, and then press Enter/Return to apply changes made in the Properties panel.

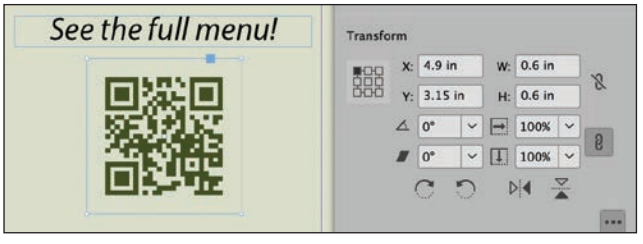
6 In the Transform controls of the Properties panel, confirm that the reference point ( ) is still set to the upper-left corner, and then type the following values in the fields to center the QR code under heading:

X: **4.9 in**

Y: **3.15 in**

W: **.6 in**

H: **.6 in**




7 To resize the QR code and center it within the frame, click Fit Content Proportionally ( ) in the Frame Fitting controls of the Properties panel.

8 Click the pasteboard to deselect all objects.

9 Choose File > Save.

# Working with object styles

As with paragraph and character styles, you can quickly and consistently format objects by saving attributes as styles. In this exercise, you will apply an existing object style to the two threaded text frames containing the body copy.

1 Choose View > Fit Page In Window.

2 Choose Window > Styles > Object Styles to display the Object Styles panel.

3 Using the Selection tool ( ), click the text frame at the left containing the "Starters & Small Plates" subhead. Click the Green Stroke And Drop Shadow style in the Object Styles panel.

4 Click the second text frame, which contains the "Entrées & Desserts" subhead. Click the Green Stroke And Drop Shadow style in the Object Styles panel.

**Tip:** InDesign offers many options for drop shadows, including distance, angle, size, and color. If you want all the drop shadows on a page to be the same, create an object style for it.




5 Click the flower graphic in the upper-left corner. Click the Drop Shadow style in the Object Styles panel.

6 Choose Edit > Deselect All.

7 Click the Object Styles panel's close box, and then choose File > Save.

# Preflighting as you work

Whenever you start working on a document—whether you're creating a document from scratch or revising an existing document—you will need to know the intended output of the document (print and/or digital display) and keep an eye on output issues. For example, are all the lines in the document thick enough to print, and will the colors display and print properly? You will learn more about all these issues throughout the lessons in this book.

In publishing, the process of evaluating a document for potential output issues is known as "preflighting." The InDesign Live Preflight feature lets you monitor documents as you're working to prevent problems from occurring. To customize Live Preflight, you can create or import production rules (called "preflight profiles") against which InDesign checks your documents. The default profile supplied with

InDesign flags issues such as missing fonts (fonts that are not active on your system) and overset text (text that is hidden because it does not fit in its frame).

In this exercise, you will check the document against the embedded Mailhouse profile, which the printer supplied to prevent common issues, such as the use of RGB colors in documents intended for CMYK output on a printing press.

**Tip:** Keep an eye on the lower-left corner of the document window to see if any preflight errors arise. You can double-click the word "error" to open the Preflight panel for details on any errors.

1 Choose Window > Output > Preflight to open the Preflight panel; the Mailhouse profile is selected.

Using the Mailhouse preflight profile, InDesign finds 13 errors, as indicated next to the red Preflight icon (●) in the lower-left corner of the Preflight panel. According to the Error list in the Preflight panel, the problems are in the COLOR category.

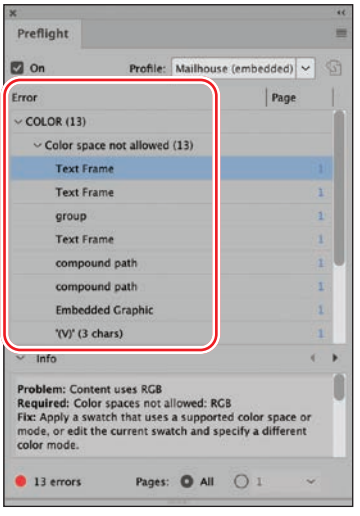
**Tip:** To quickly navigate to the object with the error, click the page number link in the Preflight panel.

2 To view the error, click the arrow next to COLOR in the Preflight panel.

3 Click the arrow next to Color Space Not Allowed, and then click the first instance of Text Frame in the list.

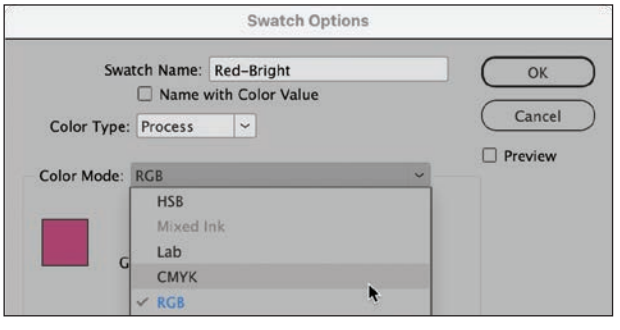
4 To display details for the error, click the arrow next to Info at the bottom of the Preflight panel.

The Problem is reported as "Content Uses RGB." The Fix area offers the following suggestion: "Apply a swatch that uses a supported color space or mode, or edit the current swatch and specify a different color mode."




5 Choose Window > Color > Swatches to display the document's color swatches.

6 Double-click the Red-Bright swatch. In the Swatch Options dialog, select CMYK from the Color Mode menu (scroll up to locate the CMYK option if necessary). Click OK.



Although the Color Space Not Allowed error was resolved, InDesign still reports one error for the GenAIImage JPEG (filename may vary). This image was generated in RGB color space and will need to be converted to CMYK in Adobe Photoshop.

7 Close the Preflight panel and the Swatches panel, and then choose File > Save.

## Viewing the document in Presentation mode

In Presentation mode, the InDesign interface is hidden entirely, and the document fills the whole screen. This mode works well for presenting design ideas to clients.

▶**Tip:** You cannot edit documents in Presentation mode, but you can make changes in any other screen mode.

1 Press and hold down the Screen Mode button (▣) at the bottom of the Tools panel, and select Presentation (▣).

2 After viewing the document, press Esc (Escape) to exit Presentation mode. The document displays in its previous screen mode, Normal.




3 To view the document without layout aids, choose View > Screen Mode > Preview.

4 Choose View > Actual Size to see the document at its output size.

Congratulations! You've learned many InDesign basics.

## Exploring on your own

To experiment more with basic features of InDesign, customize the postcard to your favorite restaurant.

▶**Tip:** To explore the many typefaces available and activate fonts to use in documents, visit *fonts.adobe.com*.

- Choose File > Save As and name the new file for the restaurant.
- Change the QR code link to the restaurant's website, and test it with your phone.
- Change the name of the restaurant and any copy. To experiment with text formatting, try the options in Window > Styles > Style Packs.
- If you're connected to the internet, replace the images with picture previews from Adobe Stock. To do this, click in the Adobe Stock field in the upper-right corner of the document window and press Enter/Return to search. To use these images, you would need a subscription to Adobe Stock.

## InDesign best practices

While completing the postcard in this lesson, you experimented with the basic building blocks of a document and the best practices for creating a document. When you create a document following best practices, the document is easy to format, revise, and replicate consistently. Some of these techniques are listed here.

- **Avoid stacking objects.** Format one object rather than using multiple objects. For example, the two text frames containing the postcard's body text have a text inset, stroke weight, stroke color, and drop shadow applied. A new user might be tempted to create this look by stacking multiple frames. Using multiple objects creates extra work when moving, aligning, and formatting objects.
- **Thread text frames.** New InDesign users are often tempted to place or paste text into separate, freestanding text frames. The text in these frames needs to be selected and formatted individually. If you flow the text through threaded frames, it remains as a single body of text called a "story." Benefits of working with a story as opposed to disjointed frames of text include the following: You can select all the text in a story for formatting, you can limit the use of Find/Change and Check Spelling to the text in a story, and you can export all the text in a story. When you're working on a longer document, such as a book, threading text frames is crucial to controlling the text placement.
- **Use styles for all formatting.** InDesign provides styles for formatting objects, paragraphs, lines within paragraphs, characters, tables, and table cells. With styles, you can quickly and consistently format everything in a document. In addition, if you decide to change a format, you can update the style to make a global change. For example, in the postcard, if you wanted to change the font used in the body copy, all you would need to do is edit the character formats of the Body Copy paragraph style. Styles can be updated to reflect new formatting, and styles can be shared among documents as well.
- **Preflight early and often.** As soon as you receive a document to work on, find out how it will be used (print and/or digital display) and use the Preflight feature to make sure the document will output correctly. For example, if the document is missing a font, you will need to acquire and activate that font before you continue working on the document.
- **Try to automate repetitive tasks.** InDesign has many sophisticated features whose purpose you may not understand until you need them. For example, if you're constantly having to change the format of phone numbers (from using parentheses to hyphens), you can do that automatically using Wildcards in Find/Change. If you need to build a table of contents or index, you'll find features to help with both. Whenever you find yourself doing anything tedious, the InDesign Help file, or even a simple Google search (such as "creating styles in InDesign"), can help you find a better way.

You will learn more about all these features as you work through the lessons.

## Review questions

1. What tool allows you to create text frames?
2. What tool allows you to thread text frames?
3. What symbol indicates that a text frame has more text than it can display—that is, overset text?
4. What tool allows you to move both frames and graphics within frames?
5. Where is the command for creating a QR code?
6. How can you tell if an aspect of a layout will cause output problems?
7. List two best practices for creating InDesign documents.

## Review answers

1. You create text frames with the Type tool.
2. You thread text frames with the Selection tool.
3. A red plus sign in the lower-right corner of a text frame indicates overset text.
4. The Selection tool lets you drag a graphics frame (and its graphic) to move it, and it lets you move a graphic within its frame.
5. The Generate QR Code command is in the Object menu.
6. The Preflight panel reports errors when something in the layout does not comply with the selected preflight profile. For example, if the selected profile specifies no RGB color usage but an RGB color or image is used in the document, an error is reported. Preflight errors are also reported in the lower-left corner of the document window.
7. InDesign best practices include the following: avoid stacking objects, thread text frames, use styles for all formatting, preflight early and often, and try to automate repetitive tasks.

# INDEX


## A

accessibility
  formatting tables for, 273, 280
Accessibility, 244
adding
  colors to the swatches panel, 139
Adjust Layout feature, 75
Adobe Bridge, 105
Adobe Capture app, 160
Adobe Color website, 160
Adobe Express
  removing photo background with, 327
Adobe Fonts service, 204, 211, 378–379
Adobe Paragraph Composer, 225, 227
Adobe Single-Line Composer, 225, 227
Advanced workspace, 17, 56, 292, 296, 301, 335
alert icon, 196, 295, 297, 299
aligning
  multiple objects, 110–111
  paragraphs, 220–222
  tabs used for, 228–229
  text in frames, 64, 65, 181–184
  to key object, 111–112, 129, 316
  to page, 110
  to selection, 113
Align panel, 110, 111, 115, 316
anchored graphics frame, 312–314
anchor points, 94–96, 313
Animated Zoom, 28, 29
Arrange commands, 68, 91, 129, 320
arrowheads on lines, 120
Articles panel, 381–383
Autocorrect option, 200–201
Auto-Fit option, 104
autoflowing text, 173–174
  semi-autoflow method, 170–171
Automatic page numbering, 64–65
automating repetitive tasks, 52, 113
auto page numbering, 63–64
Auto-Size feature for text frames, 166–167, 187

## B

Background layer, 89, 92, 333
backgrounds
  dropped with paths, 306–308
  dropped with transparency, 309–310
Background Tasks panel, 372
baseline grid, 181–184
basic styles, 239
best practices, 52
bitmap graphics, 293–294
bitmap images, 334, 338–340
bleed area, 35, 58, 77–79, 333, 372–373, 375
bleed guides, 77–79, 83
Bleed Mode, 35
Bleed Screen Mode, 370
blending modes, 335–343, 351, 352
Body Paragraphs style, 177–179, 192
Bookmarks, adding, 426
borders
  paragraph, 232
borders, table, 283–284
break characters, 180, 219, 226
bulleted lists, 231
buttons
  navigation, 401–402

## C

captions
  metadata, 105–106
Caption Setup, 105
Case Sensitive option in Find/Change, 195
CC Libraries
  color themes added to, 159–160
  creating and using, 323
  styles added to, 263, 264
cells (table)
  fill color, 281
  merging adjacent, 280
  modifying fit of text in, 278–280
  strokes, 282–283
  styles for, 255–258, 285–287

Change formatting with Find/Change dialog, 195–196
Character panel, 37, 181, 211–213, 224
characters
formatting options, 37
fraction, 216–217
hidden, 35, 228, 311, 313
special, 214
styles applied to, 39, 40–42
Character Style Options dialog, 248–249
character styles, 39, 243, 248
applying, 41–42, 250
creating, 41, 248–249, 249
formatting text for, 40–41
nesting inside paragraph styles, 251–255
Character Styles panel
applying styles in, 41–42, 249–251
creating new styles in, 41, 249–250, 252–253
check spelling dynamically, 200
Check Spelling feature, 198–201
circular frames, 16, 95, 98
Clear Effects, 335, 336, 355
Clear Overrides, 239, 243, 248, 258, 260, 265
Clear Overrides button, 40
clipping paths, 306–308, 329
CMYK color mode, 50, 137–144, 363–370
coated vs. uncoated paper, 365
colorizing images, 334
Color panel, 141–142, 161, 367
colors, 133–160
applying, 145–149, 334
creating, 139–143
finding and changing, 149–150, 367–369
groups, 155
management of, 133–136, 366–370
Mixed Ink, 144
onscreen proofing of, 136
output requirements for, 137–139
specifying settings for, 135
spot vs. process, 144
themes, 156–160
viewing environment for, 134
Color Settings dialog, 135
color themes, 156–160
adding to Swatches panel, 158
extracting from an image, 159, 234
options managing, 160
sharing to your CC library, 159–160
tool for creating, 156–157
viewing, 157
columns, 38
adjusting, 179–180, 219
creating, 171, 218
flowing text across, 37–38, 168–169
guides, 61
straddle head spanning, 218
tables, in, 277–279
compound paths, 95–96, 115, 319–320
Content-Aware Fit, 302–303
content grabber, 44, 90, 102–103, 301–303, 309, 315, 334, 340
context menus, 12, 64, 185, 200, 214, 300
Contextual Task Bar, 309, 319, 326
Control panel, 21–22, 37, 62
align options in, 111
applying color in, 147–148
editing cell strokes in, 282–283
frame fitting options, 302
math calculations in, 65, 105, 128
paragraph alignment buttons, 65
scaling graphics in, 301
scaling graphics with, 110
scaling presets, 316
select container tool, 116–117, 117
select content tool, 116–117, 129
select next object tool, 117
select previous object tool, 117
set reference point locator, 64, 65, 71
text formatting controls in, 37, 64–65, 312
Convert Direction Point tool, 96
converting
color mode for a swatch, 139
frame shapes, 95
type to outlines, 46, 319
Convert Shape feature, 95
corners
rounding, 96–97
Create Guides dialog, 61
crop marks, 373, 375
cropping graphics, 44, 301–302
curly quotes, 165
customizing the workspace, 391–393

## D

Detect Edges, 107, 313
dictionary, spelling, 198–199
Direct Selection tool, 47, 94–96, 129, 313, 319
display performance settings, 134–135, 299–300, 339
Distribute Space options, 115
distributing space between objects, 114
docking panels, 391
document pages, 59–60, 69–72
documents
adding pages to, 70

Adjust Layout feature for, 75
changing page size, 71–72
creating new, 57–59
deleting pages, 70
different page sizes within, 81
magnification controls for, 27–29
navigating through, 25–26
packaging, 378–380, 387
preferences specific to, 11–12
preflighting, 137–138, 360–363
presets created for, 58–59
previewing, 156, 370–371
printing, 375–378
rearranging pages, 70
document windows, 23–25
double arrow button, 18, 20
double arrow icon, 109, 113, 308
dragging and dropping
graphics into a frame, 303–305
table rows, 277
drop cap, 222–223, 235
Drop Cap paragraph style, 178, 184
drop shadow effect, 241, 345, 347, 355
Dynamic Preview feature, 100
dynamic spelling feature, 200

## E

Edit Hyperlink, 414
editing paths, 94–96
editing text, 193–203
Find/Change options for, 193–196
spell check features for, 198–201
Story Editor used for, 201–202
tracking changes and, 202–203
Edit Original feature, 295, 305–306, 325
effects, 344–355
applying multiple, 348–349
copying between objects, 349–350
drop shadow for text, 347
editing and removing, 354–355
feathering, 344–346
isolate blending option, 356
knockout group option, 356
layered images and, 352–353
transparency, 345
transparency settings, 351
Effects panel, 335–339, 342, 343, 349, 355, 356
Ellipse Frame tool, 15, 16
embedded files, 293, 299
em space, 64
entering text, 36, 191–193
EPUB Interactivity Preview panel, 392
Essentials workspace, 9, 37
Expand Image feature, 324–325
expanding panels, 18
exporting
Adobe Express, for, 386
emails, social media posts, or web banners, for, 383–385
graphics for digital use, 380–383
PDF files, 371–374
extracting from images
color themes, 159
fonts, 234
Eyedropper tool, 141, 156, 157
eye icon, 88, 310, 316, 333, 335, 352, 364, 408

## F

feathering, 344–346
edges of images, 344–345
gradient effect, 345–346
fills
applying across multiple objects, 115
object, 47
objects, 145–147
table, 280–281
text, 148–149, 216
type with a graphic, 319–320
finding/changing
colors, 149–150, 367–369
extra paragraph returns, 176–177
formatting, 195–196, 240
text, 193–196
Find/Replace Font, 204
Fit Frame to Content, 100
flex containers, 121–127
creating, 124
flex layout child, 126
move objects within, 121, 123
Parent-Child model, 122–123
scaling, 125–127
Flex Layout feature, 121–127
Flip Horizontal button, 320
floating panels, 19, 20
flowing text, 165–175
adding pages while, 175
along a path, 118–119
automatically, 173–174
creating text frames while, 170–171
existing frames used for, 165–167
manual process of, 168–169
Font menus, 215

fonts
adding from Adobe Fonts, 211
applying and styling, 212–214
extracting from images, 234
finding in Font menu, 215
indicators of missing, 204
packaged, 379
Type 1 font format, 212
footers, 65–66
tables, rows in, 285, 289
formatting
Finding/changing, 195–196
objects for a style, 241
overriding manual, 40, 239, 248, 265
styles used for, 52, 239–266, 365
tables, 280–283
text, 37, 39–43, 177–179
Form fields
creating a text field, 406–407
fraction characters, 216–217
frame fitting options, 302–303, 309
frames
changing shapes, 95, 128–129
placeholder, 68
rounded corners added to, 96–97
tools for creating, 15–16

## G

Gap tool, 104–105
generative AI features, 324–327
Contextual Task Bar, 324, 326
Expand Image feature, 324–325
Text To Image feature, 326–327
Text To Image panel, 324–327
glyphs, 217, 235
Glyphs panel, 214, 217
Go To Link button, 295, 297, 300
Go To Page, 25, 178, 182, 184
GPU card, 29, 300
Gradient Feather tool, 346
Gradient panel, 116
gradients, 152–154
adjusting the direction of, 153–154
creating and applying, 152–153
feather effect for, 345–346
Gradient Swatch tool, 153–154
graphic frames
metadata captions added to, 105–106
graphics, 43–45, 293–329
clipping paths for, 306–308
cropping, 301
display settings, 300
display settings for, 134–135, 300
dropped backgrounds, working with, 306–310
editing original file for, 305–306
Effective resolution, 296
exporting for digital use, 380–385
filling type with, 319–320
finding spot colors in, 368–369
generative AI, using, 324–327
importing, 43–44, 300–305, 314–316, 319
InDesign libraries for, 320–322
links to, 293–296
native formats for, 310
placing, 43–44, 100–102, 300–305
positioning, 43–45, 301–302, 304, 308–310
rotating, 308
rotating within frame, 109–110
scaling, 43, 107, 296, 300–305, 301, 309, 320
table cells with, 284–288
transparency applied to, 338–341
updating revised, 297–298, 306
vector vs. bitmap (pixel-based), 293–294
wrapping text around, 106–108, 312–314
graphics frames, 99–108
anchored, 312–314
create grid of, 101–102
drawing new, 99–100
fitting content into, 301–303
placing graphics into, 100, 302–305
resizing, 100
resizing and moving images within, 102–104
rotating contents of, 109–110
space adjusted between, 104
grayscale images, 333–334
grid
baseline, 181–183
grouped objects
selecting and modifying, 116–117
groups
color, 155
objects, 47, 353, 356
panel, 19, 20, 31
selecting objects within, 116–117
style, 178
guides
bleed, 77–79
deleting unneeded, 63
dragging from rulers, 61–62
parent page, 61–62
Smart Guides feature, 111, 112, 341
Step And Repeat technique, 62
viewing in documents, 35, 333

Gutter, 58
gutter settings, 58

## H

Hand tool, 14–15, 26, 63, 343, 349, 355
hanging indents, 231
headers
  parent page, 63–65
  table, 285–286, 289
Help menu, 30
hidden characters, 35, 176, 191, 228, 272, 311
History panel, 98–99
Home screen, 8, 57
HTML Export feature, 381–383
Hyperlinks, adding, 393
  to a location within the document, 396
  to an email address, 395
  to a text anchor, 398
  to a URL, 393
  using for navigation tabs, 399–400
Hyperlinks, changing the source, 414–415
hyphenation settings, 225–226

## I

IDML files, 379, 387
Ignore Text Wrap option, 318
Illustrator
  importing files from, 314–316
  layered files from, 315–316
  share colors with, 139
  spot colors from, 368–369
  transparency in files from, 341–342
images
  adjusting display quality, 300
  applying transparency to, 340–341
  bitmap (pixel-based), 293–294, 334, 340
  clipping paths for, 306–308
  display settings, 134–135
  dropped backgrounds in, 306–310
  extract from, 159, 234
  feathering edges of, 344–345
  identifying imported, 294–296
  placing in graphic table cells, 284–285
  resizing, 102–104, 107, 300–305, 308, 309, 320
  resolution of, 134–135, 296
  rotating, 108–109, 308
importing
  graphics, 300–305, 306, 309
  Illustrator files, 314–316
  multiple-page PDF or Illustrator files, 328
  snippets, 68, 76
  styles, 262–263
  text, 37–38, 165, 192–193
Importing
  tables, 273
inch marks, 165
InCopy, 190, 192–193, 203
InDesign libraries, 320–322
Info panel, 17
Ink Manager feature, 369–370
Insert Break Character option, 180, 219, 226
Insert Pages, 70
Inset Spacing options, 37
Installing, 2
Interactive For PDF workspace, 390–391
interactive PDFs
  exporting final, 420–421
  limitations of, 393
  making changes to, 414–420
  replacing pages, 419–420
  testing, 421
interface, customize, 11
Item Information, library item, 322

## J

jump lines, 185–187, 187
justified text, 225

## K

Keep Options, 181, 209
kerning, 223–224, 235
keyboard shortcuts, 14–15, 17, 31
  magnification controls, 27, 29, 93
  number pad used for creating, 250
  single-letter for tools, 14
  text formatting with, 240, 246, 249
  Zoom tool, 96
key objects, 111–112, 129, 316

## L

layers, 87–92, 333
  creating new, 91–92
  effects applied to image layer, 352–353
  explanation of, 87–89
  hiding or displaying document layers, 88, 333, 334–335, 341
  hiding or displaying object layers, 310, 316, 352–353
  Illustrator files with, 315–316
  locking/unlocking, 91, 99, 334–335

moving items between, 89, 91, 92
naming/renaming, 92
Photoshop files with, 310, 352–353
reordering, 89, 91
Layers panel
select, hide, show, in, 352
using to select objects, 409
leaders, tab, 228, 235
Levels, transparency settings, 335–336, 339, 343
libraries
Creative Cloud, 159–160, 323
InDesign, 320
Ligatures, 214
line breaks, 225–226
lines
arrowheads on, 120
drawing, 14, 119–121
line styles (nested), 253
Line tool, 14, 119
linked files
explained, 293
relinking multiple, 305
revealing the location of on disk, 297
viewing information about, 295–296, 298
Links panel, 294–299
caption options, 105
editing original images from, 306
link status icons in, 298
list of linked files in, 295–296
managing links in, 294–296
relinking files in, 298
replacing images in, 297–298
updating revised files in, 298
lists, bulleted/numbered, 231
Live Preflight feature, 49–51
loaded graphics icon, 43, 45, 101, 301, 333
loaded text icon, 38, 165, 170–171, 173
Load Styles feature, 262–263
local overrides, 247, 265
Locate Color feature, 149–150, 367–369
locked layers, 91–92, 333, 334–335

## M

magnification
changing, 28
magnification controls, 27–29, 31, 93
margins
hanging punctuation outside, 221–222
specifying settings for, 58
masks, 306
math calculations, 65, 105, 128
Math Expressions, 217
measurement units, 57, 312
Media panel, 412
Medium Light interface, 8
Menu Customization feature, 30
menus
context, 12
panel, 21–22
metadata
captions, 105–106
Missing Fonts, 204–205
missing links, 299, 305, 321
Mixed Ink colors, 144
modified link icon, 297, 321, 329
monitor calibration, 136
multicolumn text frames, 172–173, 218

## N

navigating documents, 25–26, 62, 69, 92, 106, 294
navigation buttons, 401–402
nested style
prerequisites for creating, 267
nested styles, 39, 251–255
character styles created for, 251–252
creating within paragraph styles, 253–254
individual line styles as, 253
Next Page button, 26
Normal Mode, 35
Normal Screen Mode, 370
Normal view mode, 204, 228
Notes panel, 30, 203
numbered lists, 231
Numbering & Section Options feature, 72–73, 74, 83

## O

Object Layer Options, 310, 316, 352–353
objects, 12, 46–47, 87–126
aligning multiple, 110–111
aligning with key, 111–112
aligning with Smart Guides, 112
arrange commands, 91
colors applied to, 145–148
copying effects between, 349–350
Distribute Space options, 115
grouped, 116–117
InDesign libraries for, 320–322
moving, 46, 98, 128
moving between layers, 92, 129
multiple effects applied to, 348–349
parent page, 64, 83

rotating, 46, 108–109, 308
scaling multiple, 111
space between with Gap tool, 104–105
stroke and fill changes, 47
styles applied to, 39, 49–50, 241–243
transforming multiple, 113
transforming shapes, 93–97, 128–129
object styles, 39, 49–50, 124–125, 183, 241–243, 267, 350
Opacity Slider, 336, 355
opacity values, 336, 343, 347–349, 355
Open PDF, 422–425
converting an Adobe Illustrator file to InDesign, 424–425
converting a PDF to InDesign, 422–423
OpenType, 213–214
OpenType fonts, 213–214
Optical Margin Alignment, 221–222
output requirements, 137–139, 372–374
overriding manual formatting, 265
Overriding parent page objects, 67, 76
overset text, 38–39, 53, 95, 165, 168, 173, 187, 193, 202, 361, 387

## P

packaging files, 378–380, 387
page numbering, 60
changing the scheme for, 72–74
jump lines added with, 185–187, 187
parent page marker for, 64–65, 83
tri-fold brochure and, 81
pages
adding new, 70, 175
deleting, 70
flowing text into, 175
navigating, 25–26, 62, 69, 92, 107, 294
numbering, 60, 64–65, 72–74, 83
parent, 59, 60–68
rearranging, 70
resizing, 71–72, 75
Pages panel, 18, 59
navigating pages in, 25, 73
page numbering in, 72–74
parent pages applied in, 69
Pages tool, 81
panel icons, 18
panel menus, 21–22
panels, 17–21
creating grouped, 19, 31
creating stacked, 20
docking, 391
expanding and collapsing, 18
menus, 20
menus related to specific, 21–22
moving the Tools and Control, 20–21
opening and closing, 17
rearranging and customizing, 19–20
PANTONE colors, 140, 365
Paragraph panel, 37, 183, 220–221
paragraph rules, 233, 260–261
paragraphs
alignment changes, 220–221
changing extra returns for, 176–177
formatting options, 37, 39, 181–184, 209, 219, 225–228, 231–232, 235, 312
horizontal rules applied to, 233–234
hyphenation settings, 225–226
shading applied to, 232
spacing changes between, 210
styles applied to, 39–40, 166, 177–179, 247–248
paragraph styles, 40–41, 243, 244–247
applying, 40–41, 166, 177–179, 247–248, 365
creating new, 244–246
nested styles within, 39, 251–255
updating, 183–184, 260–262
paragraph styles and character styles, difference between, 243
Paragraph Styles panel
choosing styles in, 177–179
creating new styles in, 245
loading styles in, 263
parent pages, 59, 60–68
applying to document pages, 69
creating additional, 66–67
guides added to, 61–62
naming/renaming, 66
overriding parent page objects, 67, 76
parent-child (based on) structure for, 66–67, 68, 83
placeholder frames added to, 68
text frames created on, 63–66
pasteboard, 23, 43, 62, 78–79, 97, 111–112
Paste In Place command, 63, 352
Paste Into feature, 98
Paste Remembers Layers feature, 90
Pathfinder feature, 93, 128–129
paths
clipping, 306–308
compound, 95–96, 319–320
editing, 94–96, 313–314
flowing type along, 118–119
PDF comments
importing, 417–418
using from Acrobat, 418–419

PDF files
creating press-ready, 372–374, 387
creating proofs, 371–372
exporting interactive, 420
pen icon in layers panel, 90, 91, 333
Pen tool, 96, 313
Photoshop
clipping paths from, 306–308
layered files from, 310, 352–353
share colors with, 139
transparent backgrounds from, 309–310
pixel-based graphics, 293–294
Place command, 37, 68, 76, 100–102, 165, 168, 169, 192, 273, 300, 306, 309, 319
placeholder frames, 68
placeholder text, replacing, 76
PNG file format, 380–382
Popups, creating, 408–411
trigger buttons, 410–411
preferences
application-specific, 11
Autocorrect, 200–201
document-specific, 11
Guides & Pasteboard, 112
Spelling, 200
preflighting, 49–51
preflighting documents, 49–51, 52, 137–139, 360–363
preflight profiles, 49–50, 137–138, 361–363, 387
Presentation mode, 35, 51
presets
Adobe PDF, 371–374
new document, 57–59
print, 375–376
sharing, 374
press-ready PDFs, 372–374, 387
pre-threading text frames, 168
previewing
documents, 156, 266–267, 370–371
separations, 364–365
Preview mode, 35, 310, 370
Previous Page button, 25
Print Booklet feature, 377–378
printing
documents for proofing, 375–378
requirements for, 137–139
saving presets for, 375–376
setting options for, 375–376
process colors, 144, 161, 366–367, 369–370
proofing
booklets, 377–378
colors onscreen, 136
PDFs created for, 371–372
Properties panel, 9
align options in, 111
Appearance area, 47, 223, 245, 249, 354
Character controls, 36, 249
Effects area, 354
Frame fitting area, 48, 302
importing from, 169
Importing from, 43
Pathfinder tools in, 128
Quick Actions, 115
Text area, 36, 40–41, 149, 166, 178, 193, 216
Transform area, 16, 46, 109–110, 316
punctuation
hanging outside margins, 221–222
styles applied to, 42

## Q

QR Code, 48, 53
Quick Apply dialog, 240

## R

raster graphics, 293
Rectangle Frame tool, 15–16, 99, 112
Redefine Style option, 240, 262, 267
reference point locator, 46, 64, 71, 81, 109, 110, 128, 304, 309, 315, 320
Relink button, 295, 298, 321
relinking files, 298, 305, 329
Rename Hyperlink, 397
Replace Fonts, 422
Reset Hyperlink, 414
resolution of images, 134, 296, 380–382, 384
Responsive design, 121–127
Reveal In options, 297, 423
reverse type, 148, 232
rotating
images, 304, 308
objects, 46, 108–109
spreads, 79–80
rounding corners, 96–97
rulers
dragging guides from, 61–62
tabs in, 228–230
rules
paragraph, 260
rules, paragraph, 233

## S


scaling
graphics, 43–44, 98, 102–104, 107, 110, 301–302, 304, 308, 309, 315–316
groups, 98
multiple objects, 111
using the cursor in a field, 126–127
Screen Mode, 35, 51, 78, 125, 350, 370
section options, page numbers, 72–74
Section Prefix, 74
selecting
content vs. frames, 90, 102, 309
objects in groups, 47, 116–117, 129
objects on layers, 88
tools, 13, 31, 47
Selection tool, 13, 31, 44, 46, 53, 90, 97, 129, 309
Send To Back, 68, 91, 320
Separations Preview feature, 364–365, 369–370
shading paragraphs, 232
shapes, 93–97
changing shapes with other shapes, 93–97, 128–129
compound, 95–96
converting, 95, 115
cropping graphics with other shapes, 97–98
distribute space between, 113
repeating and distributing, 114
wrapping text around, 106–108
sharing
color themes, 159–160
PDF presets, 374
styles, 262–263, 264
Slug view mode, 35
Smart Guides feature, 111, 112, 301, 341
Smart Text Reflow feature, 175
snippets
creating, 68
placing, 68, 76
soft proofing, 136
spacing
between objects, 104
between-paragraph, 210
letter and word, 223–224
vertical, 181, 209–210
Span Columns controls, 219, 232
special characters, 214
spell check features, 198–201
adding words to dictionary, 199
Autocorrect option, 200–201
Check Spelling dialog, 198–199
dynamic spelling, 200
spot colors, 140–141, 144, 161, 364, 366–369
Spread, 60
spreads
rotating, 79–80
viewing, 61, 64, 66, 72, 76
square frames, 16, 95
stacked panels, 20
Step And Repeat technique
for guides, 62–63
for shapes, 114
stop markers for gradients, 152, 354
stories, defined, 37, 52
Story Editor, 201–202
straddle head, 219
Stroke/Fill, applying color, 47, 119, 145–146, 148–149, 151, 216, 334
Stroke panel, 120
arrowhead area, 120
strokes
color, 147–148
object, 47
table cell, 282
text, 216
style overrides, 247, 265
styles, 39–43, 239–267
applying paragraph, 246
basing on existing styles, 242, 264
best practices for, 264–265
cell, 255–258, 285–287
character, 39, 40–42, 248–250
creating and applying, 239–240, 241–247
formatting with as best practice, 52
globally updating, 260–262
groups of, 246, 264
loading or importing, 262–263
modifying and redefining, 240
nested, 39, 251–255
object, 39, 49–50, 241–243
overview about, 239–240
paragraph, 39–40, 166, 183–184, 244–247
Quick Apply feature for, 240
sharing, 262–263, 264
table, 255–260, 285–287
Subject-Aware Text Wrap feature, 317–318
Swash feature, 213–214
swatches
color mode conversion, 139
color theme, 156–160
creating, 140–143
deleting, 155, 366–367
finding/changing, 149–150, 367–369
gradient, 152–154
grouping, 155

libraries of, 366
naming/renaming, 143
tint, 150–151, 355
Swatches panel, 21, 68, 118, 119, 140, 143, 145–148, 149–150, 153, 158, 366–368, 387

## T

tab
settings, 228–231
Table of contents, creating, 402–406
Table of contents, updating, 416
tables, 271–289
accessibility, and, 273, 280
adding and deleting rows from, 276–277
adjusting column widths, row heights, and text placement in, 278–279
adjusting rows and columns in, 284–285
borders added to, 283–284
cell fill color applied, 281
cell strokes edited in, 282–283
changing rows and columns in, 275–277
converting text to, 272–273
creating new, 271–273
deleting rows and columns from, 277
edit formatting for, 287–288
fill patterns and colors for, 280–281
formatting options for, 280–283
graphics added to cells in, 284–288
header rows created for, 285
importing from other apps, 273–274
merge cells, 280
rearranging rows and columns in, 277–279
styles for cells, 255–259, 285–287
Table Styles panel, 258–260
tabs, 228–231
aligning text to, 228–229
controls for working with, 230
hanging indents and, 231
leaders used with, 229
text, 36–39, 191–203
adding text, 36–37
aligning to grid, 181–184
colors applied to, 148–149
context menu, 12
editing, 191–203
filling with a graphic, 319–320
finding/changing, 176–177
Finding/changing, 193–196
flowing, 165–175
fonts applied to, 212–214
formatting options, 37
importing, 37–38, 192–193
Importing, 165
paragraph styles applied to, 39–40, 166, 177–179
placeholder frames for, 68
placing in documents, 37
replacing placeholder, 76
stroke and fill for, 216
tables created from, 272–273
transparency applied to, 342–343
vertical spacing of, 181, 209–210
wrapping around graphics, 106–108, 312–314, 317–318
Text Frame Options, 318
text frames
Auto-Size feature, 166–167
columns in, 38–39, 218–219
creating, 170–173
formatting options, 37
importing text into, 165
inset spacing options, 64
multicolumn, 172–173, 218
parent page, 63–66
reshaping, 94–95
resizing, 166–167
threaded, 52, 168–175
Text To Image feature, 326–327
Text To Image panel, 324, 326
Prompt field, 326
Text Wrap panel, 107, 312–313, 317–318
threaded text frames, 52, 168–175
TIFF file format, 333
tint slider, 355
tint swatches, 150–151, 355
Tool Hints, 30
tools
display info about, 30
overview of using, 12–15
selecting, 31
viewing hidden, 15–16
Tools panel, 9, 13–16
tool tips, 13, 14, 194, 239, 265
tracked changes, 202–203
tracking, typographical, 223–224
Transform Again features, 113
transforming multiple objects, 113
transforming objects
changing shapes with other shapes, 93
compound shapes, 95
converting shapes, 95
repeating shapes, 99
rotating an image within its frame, 109
rotating an object, 108

Transform panel, 61–62
transparency, 333–356
  applying to imported graphics, 338–341
  applying to text, 342–343
  effects, 344–355
  Illustrator files with, 341–342
  overview of features for, 335–338
  Photoshop backgrounds with, 309–310
  settings and options for, 351
  using tints vs., 355
transparency effect settings, 351
trifold layout, 81
Type 1 fonts, discontinued, 212
Type On A Path feature, 118–119
Type On A Path tool, 118
Type tool, 13, 118
  creating a frame with, 63
  editing text with, 36–37, 191–193
  formatting text with, 166, 212–214
  loading with multiple files, 169
  releasing frame from parent page with, 76
  using with frame selected, 64–65, 319
typography, 209–235
  column options, 218–219
  composition methods, 227
  drop cap creation, 222–223
  fonts and type styles, 211–214
  fraction characters, 216–217
  line break adjustments, 225–226
  paragraph alignment, 220–222
  paragraph rules, 233
  tracking and kerning adjustments, 223–224
  vertical spacing adjustments, 209–210

## U

Undo command, 8
Update Link button, 295, 298, 321, 329
updating
  revised graphics, 293, 297–298, 329
  styles, 183–184, 260–263

## V

Variable Font format, 212
vector graphics, 293–294, 314–316, 319
  and transparency, 338–339, 341–342
Vertical Justification options, 37, 64, 66, 181, 209
vertical spacing adjustments, 181, 209
Video
  adding to a PDF, 412–413
view commands, 27
viewing environment for color, 134
View Threshold menu, 182

## W

warning about stacking, 52
workspace
  creating your own, 30
  customizing, 391–392
  Interactive For PDF, 391
  resetting to saved state, 412
  saving, 393
wrapping text, 106–108, 312–314, 317–318

## Z

zoom, animated, 29
zooming in/out, 27, 93
Zoom tool, 28–29, 31

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