## VISUAL QUICKSTART GUIDE

## $y^{2}$ InDesign


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## VISUAL QUICKSTART GUIDE

# In Design $C C$ <br> FOR WINDOWS AND MACINTOSH <br> SANDEECOHEN 

## Visual QuickStart Guide InDesign CC

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## Introduction

 Welcome to the InDesign CC Visual sion of the book. From its humble start, InDesign is now the primary application for desktop publishing and page layout. I feel very lucky to have been working with and teaching InDesign since its very first beta. In fact, this is the only third-party book that has had editions for all versions of InDesign.
## Using This Book

If you have used any of the other Visual QuickStart Guides, you will find this book to be similar. Each chapter is divided into different sections that deal with a specific topic - usually a set of tools or similar commands. For instance, the chapter on text has sections on creating text frames, typing text, selecting text, and so on.
Each of the sections contains numbered exercises that show you how to perform a specific technique. As you work through the steps, you gain an understanding of the technique or feature. The illustrations help you judge if you are following the steps correctly.
However, unlike some other books, this book doesn't provide you with files and images that you can use to follow along with the exercises. That's because the exercises are very simple and you can use just about any text or image to practice on. I also feel that you'll learn better with files that make sense to you, rather than working with mine.

I've also sprinkled sidebars, printed in colored boxes, throughout the chapters. Some of these sidebars give you a bit of history or background for a specific feature. Other times, I've written out humorous stories about desktop publishing. These sidebars are the same little stories and anecdotes I tell my students in the classes I teach.
Strictly speaking, you don't have to work through the book in the same order as it is printed. If you want to learn more about imported images, you can skip right over to that chapter.

However, the book is organized in the same order that I run my InDesign beginner classes. We start with the document setup, then move to basic text, color, and so on. It's just as if you were sitting in one of my classes. The only thing you won't see is a lunch break.

## Mac or Windows?

It really doesn't matter if you're working on a Macintosh or Windows computer. Adobe has been extra careful to make the program look, feel, and operate exactly the same on each platform.
However, there are some times that they have had to make a change between the platforms. They haven't done it just on a whim. The operating system has required it. For instance, the command for Preferences is under the InDesign menu on the Mac. But Windows doesn't provide an application menu. So the Preferences command is under the Edit menu for that platform.
Whenever there is a difference between the platforms, I'll separate the instructions out with labels for each platform - Mac for Macintosh, Win for Windows.

## Instructions

You will find it easier to use this book once you understand the terms I am using. This is especially important since some other computer books use terms differently. Therefore, here are the terms I use in the book and explanations of what they mean.
Click refers to pressing down and releasing the mouse button on the Macintosh, or the left mouse button on Windows. You must release the mouse button or it is not a click. Don't move the mouse during a click or you'll wind up doing a press and drag (covered below).
Press means to hold down the mouse button, or a keyboard key. Keep pressing down. Don't let go until you finish doing whatever it is you're in the middle of. For instance, you need to press (hold) the Shift key down as you drag the mouse to create a square frame. Then you let go of the mouse before you release the Shift key.
Press and drag means to hold the mouse button down and then move the mouse. I also use the shorthand term drag.

## Menu Commands

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

## Modifier Keys

One big difference between the platforms is the keys that you press on the keyboard. The Macintosh uses a key called the Command or Apple key. I shorten this to Cmd.

Windows uses a key called the Control key. I shorten this to Ctrl. The Macintosh uses a key called the Option key while Windows uses a key called Alt.
When I tell you what modifier keys to use, I always list the Macintosh key first, then a slash, and then the Windows key second. So the instruction "Hold the Cmd/Ctrl key" means hold the Cmd key on the Macintosh platform or the Ctrl key on the Windows platform. When the key is the same on both computers, such as the Shift key, only one key is listed.


A The default setting for the InDesign interface is a dark background with white text and icons.

c Choose Light from the Color Theme menu to match the screen shots in this book.

## Keyboard Shortcuts

You'll notice that I don't usually provide the keyboard shortcut for commands. For instance, l'll list the menu command for File $>$ New, but not the keyboard shortcut Cmd/Ctrl-N.
While keyboard shortcuts help you work faster, you really don't have to start using them right away. In fact, you will most likely learn more about InDesign by using the menus. As you look for one command, you may see another feature that you would like to explore.
So don't worry about keyboard shortcuts as you start. Focus on the big picture.

## Changing the Interface Theme

One thing that will jump out at you is the difference between how my screen shots of the program look and the version on your computer.
Your version most likely looks like figure A. I changed my interface to a lighter theme so that the screen shots in the book would be easier to print and read. So my interface looks like figure в.
You may want to change the interface preference in you version of InDesign so that your panels match mine.

## To change the interface theme:

1. With InDesign running, but no document open, choose InDesign >
Preferences > Interface (Mac) or Edit > Preferences > Interface (Win). This opens the Interface settings preferences c.
2. Deselect the option to Match Pasteboard to Theme Color.
3. Click OK. The interface has now changed to the lighter colors.

## Viewing Videos with QR Codes

As you go through the book, you'll see small square barcodes next to some of the illustrations or information A. (There's one on the preceeding spread.) You've probably seen these codes in magazines, billboards, and product boxes.
These squares are called QR codes (Quick Response codes). Because I've added the QR codes to this print book, you'll actually be able to view short videos that explain or animate some of the screen shots and information in the book.
For years l've added arrows to my screen shots to indicate there was some sort of motion on the page. Now, in addition to seeing the arrow, you'll also be able to actually see me dragging the object on the page. And you'll hear me explaining things. I'm very excited about adding movies to what is ordinarily just a print book. You'll get the best of both print and digital books.
In order to use these QR codes, you'll need to have a smartphone or tablet. This can be an iPhone, an iPad, an Android phone, or tablet. You then need to install a QR code reader onto your device. There are many barcode reader applications available for either Mac iOS or Android.

- QR Reader for iPhone by TapMedia Ltd, which works on both iPhones and iPads.
- NeoReader (the one I use) is available for Mac iPhone and iPad.
- QR Droid by Google is a free app for the Android platform.
One of the reasons I've added the QR codes is to enhance the book with movies. I love the idea of these little movies to help explain the screen shots - especially screen shots showing motion on the page. The other reason is that InDesign CC can now create these


A A QR code in the margin of this book.
barcodes directly in the application. So this is a perfect way to use the new feature.

## Viewing the QR code movies:

1. Find a page with a $Q R$ code $B$.
2. Open a $Q R$ reader on your smartphone or tablet.
3. Focus the camera in the scan mode on the QR code on the page C . The QR reader should automatically read the URL.
4. Click to open the URL. This launches an application that will take you to a YouTube page where the video appears.
5. Click to play the video D.
6. Enjoy!


B Reading a QR code in this book.

c Using a smartphone to scan a QR code.


D Watching a video opened by scanning a QR code.

## And Don't Forget...

Whether you're learning InDesign in a class or on your own, I hope this book helps you master the program.

## Just don't forget to have fun!

Sandee Cohen
(Sandee@mac.com)
June, 2013


## Colophon

This book was created using InDesign CC running on a MacBook Pro. Screen shots were taken using Snagit. Typefaces are from the Adobe Myriad Pro type family.

Custom fonts for the tips and caption letters were created using IndyFont from indiscripts.com.
Videos were created and edited using ScreenFlow software.

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David Lerner of Tekserve, who has helped me keep my computers running in the middle of the book crunch. Tekserve is the best place in NYC to buy or service Macintosh computers and iPads.

Marc Autret of indiscripts.com, who generously gave me a copy of IndyFont, originally created by Theunis de Jong, which creates custom fonts right in InDesign!


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## Working with Objects 4

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$\boldsymbol{B}_{\text {mechanicals, advertising agencies }}^{\text {ack in the old days of board }}$ and design studios had a production area called the bullpen. It was the people in the bullpen - called bullpen artists - who actually created the mechanical. Most of them were kids just out of design school; the bullpen was usually their first step up the ladder in advertising or design.
The kids in the bullpen were amazing. Although not professional illustrators, they could create all sorts of artwork for the layout.
The same is true when working with InDesign. Although InDesign is not a full-fledged drawing program such as Adobe Illustrator, you can use InDesign's tools to create a wide variety of effects by distorting, moving, resizing, duplicating, and aligning objects. It's your electronic bullpen.

## Types of Frames

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

## Unassigned frames

Unassigned frames are created with the Rectangle, Ellipse, and Polygon tools A. These frames are useful for adding color to your layout or a stroke around an area without inserting a graphic or text.

## Graphic frames

Graphic frames are created with the Rectangle Frame, Ellipse Frame, and Polygon Frame tools. When you create a graphic frame, diagonal lines inside the frame indicate that you can insert a graphic inside the frame $A$.

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

## Text frames

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


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

## Diagonal Lines in Graphic Frames?

The diagonal lines inside a graphic frame come from a convention that was used in traditional pasteboard mechanicals.
When pasteboard artists drew the lines on mechanicals, they would often block off an area with diagonal lines to indicate that a picture or graphic was to go there.
Electronic page-layout programs such as Adobe InDesign and QuarkXPress use the same convention. The diagonal lines indicate where photos or graphics need to be inserted.
However, there is absolutely no rule that says you can only place images in graphic frames. You can place text in graphic frames or images in unassigned frames. The choice is yours.


B The Rectangle Frame tool in the Tools panel creates rectangular graphic frames.

c The Ellipse Frame tool in the Tools panel creates elliptical graphic frames.


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

## Using the Transformation Values?

You may notice that a label appears when you drag or create objects that contains feedback as to the position, size, or angle of the object. This is the Transformation Values cursor.

Rather than clutter the illustrations in this chapter, I've turned off the Transformation Values.
But you should get in the habit of using those labels to work more precisely.

## Creating Basic Shapes

You use the rectangle, ellipse, and polygon frame tools to create graphic frames into which you place images.

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

## To create a rectangular graphic frame:

1. Click the Rectangle Frame tool in the Tools panel B.
2. Drag across the page to create the rectangle.

TIP Hold the Opt/Alt key to draw the object from the center.
3. Release the mouse button when the rectangle is the correct size.

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

## To create an elliptical graphic frame:

1. Click the Ellipse Frame tool in the Tools panel c.
2. Drag across the page to create the ellipse.

Til Hold the Opt/Alt key to draw the object from the center.
3. Release the mouse button when the ellipse is the correct size.

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

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

## To create objects numerically:

1. Click with either the Rectangle or Ellipse Frame tools. A dialog box appears D.
2. Enter the width and height amounts.
3. Click OK. The frame appears where the mouse was clicked.

## To create a polygon graphic frame:

1. Choose the Polygon Frame tool in the Tools panel A.
2. Click on the page. This opens the Polygon dialog box B.
3. Enter a number in the field for the Number of Sides to the polygon.
4. To create a star, change the amount in the Star Inset field from 0\% to a higher number.
5. Click OK. The polygon is created.

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

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

TIP You can also drag across the page to create the polygon or star.

The Line tool lets you draw a straight line.

## To create straight lines:

1. Click the Line tool in the Tools panel $c$.
2. Position the cursor where you want the line to start.

Til Hold the Opt/Alt key to draw the line from its centerpoint.
3. Drag to create a line.

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


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


```
-Polygon Settings
    Number of Sides: }
        Star Inset: 素 0%
```

B The Polygon Settings dialog box creates either polygons or stars.

c The Line tool in the Tools panel creates straight lines.

## Converting Shapes

So what if you've created a circle and later on realize you need a rectangle? What do you do?
Simple, you can use the Pathfinder Convert Shape commands to change an object from one shape to another. (See Chapter 7, "Points and Paths," for more information on the Pathfinder commands.)


Direct Selection tool


## D

The Selection tool in the Tools panel selects entire objects. The Direct Selection tool selects a point on an object.


E Drag to create a marquee to select objects.

## What Are the Differences

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

The Selection tool will always select the object as a whole. Use this tool when you want to manipulate the entire object.
The Direct Selection tool will always select the points or segments that make up a frame. Use the Direct Selection tool to reshape a path.
Both tools can select placed images within a frame, as covered in Chapter 8, "Imported Graphics."
If you've ever worked with Adobe Illustrator, you'll instantly recognize the two selection tools as identical to their Illustrator cousins.

## Selecting Objects

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

## To select by clicking:

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

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

TIIP To select objects behind others, hold the $\mathrm{Cmd} / \mathrm{Ctrl}$ key as you click the mouse button.

TIP Double-click on a graphic frame to toggle between the Selection and Direct Selection tools.

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

## To select by dragging a marquee:

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

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

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

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

## To select all the objects on a page:

Choose Edit > Select All.
This command works only if you do not have an insertion point blinking inside a text frame.

## Moving Objects

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

## To move an object by dragging:

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

TIIP If an object has a fill color, gradient, or image inside it, you can drag with the Selection tool directly inside the object. Otherwise, you must drag by the stroke or bounding box.
4. Drag to move the object. If you drag quickly, you will see only a bounding box preview of the object being moved A.
or
Press and pause for a moment before you drag the object. The pause gives InDesign enough time to let you see a preview of the object as you move it B.


A Quickly drag to see the bounding box of the object being moved.


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

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


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

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

## To use the Move command:

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

TIP This command is also available in a contextual menu or by double-clicking the Selection or Direct Selection tools.

TIIP Select the Preview checkbox to see the results of your actions as you enter numbers in the dialog box.
3. Use the Horizontal and Vertical fields to move the object along those axes.
4. Use the Distance field to move the object an absolute distance.
5. Use the Angle field to set the angle along which the object moves.
6. Click OK to move the original object.
or
Click Copy to create a duplicate of the object in the new position.

## To copy an object as you drag:

1. Hold the Opt/Alt key before you start the move.
2. Move the object as described on the opposite page. A double-headed arrow indicates that a copy is being created $\mathbf{D}$.
3. Release the mouse button. The copy appears in the new position.

## Replicating Objects

There are several commands you can use to create duplicates of objects. Use the Copy command when you want to put the object on the clipboard so you can paste it somewhere else.

## To copy objects:

1. Select an object to copy.
2. Choose Edit > Copy.

Use the Cut command to remove the object from the page so it can be pasted elsewhere.

## To cut objects:

1. Select an object to cut.
2. Choose Edit > Cut.

Use the Paste command to see the contents of the clipboard.

## To paste objects:

Choose Edit > Paste. The contents of the clipboard appear in the center of the window area A.
or
Choose Edit > Paste in Place. The contents of the clipboard appear in the same location on the page as when they were originally selected.

The Duplicate command makes a copy without changing the contents of the clipboard.

## To duplicate objects:

1. Choose the object to duplicate.
2. Choose Edit > Duplicate. The selected object appears on the page at the same distance that the last object was moved B.


## Using Paste in Place

I always wondered just how useful the Paste in Place command is. After all, if you already have a copy of an object in one place, why would you need a second copy right over it?
That's not the point of Paste in Place. The power of the command is that you can paste an object in the same place on different pages. You can even paste in the same place in different documents. This is very helpful for creating documents that all look the same.


E The Step and Repeat dialog box set to create a grid of repeated objects.

InDesign makes it easy to create a grid of an object as you drag to create it. This is known as the gridify feature.

## To create a grid as you draw an object:

1. Select one of the drawing tools and start the drag to draw the object.
2. Without releasing the mouse button, press the up/down or left/right arrows. This creates rows and columns that duplicate the object as follows:

- The up and down arrows increase and decrease the number of rows.
- The left and right arrows increase and decrease the number of columns.

TIP
Add the $\mathrm{Cmd} / \mathrm{Ctrl}$ key and use the arrow keys to change the spaces between the rows or columns.
3. Release the mouse button when you have as many objects you you need c:

The gridify feature doesn't give you numerical control over the space between the rows and columns. That's when you want to use the Step and Repeat command.

## To duplicate multiple objects:

1. With an object selected, choose Edit > Step and Repeat. The Step and Repeat dialog box appears D.
2. In the Repeat Count field, enter the number of duplicates you want to create.
3. If desired, check Create as a grid. This changes the Repeat Count to Rows and Columns E.
4. In the Horizontal Offset field, enter a distance for the horizontal space between duplicates.
5. In the Vertical Offset field, enter a distance for the vertical space between duplicates.
6. Click OK.

## Resizing Objects

Very often things need to be made bigger or smaller. InDesign gives you several different ways to scale objects. You can also use the bounding box handles to change the dimensions of the object visually. This is the easiest way to quickly resize an object.

## To resize using the bounding box handles:

1. Choose the Selection tool.
2. Choose which handle to drag based on the following options A :

- Drag the corner handles to change both the width and height.
- Drag the top or bottom handles to change the height only.
- Drag the left or right handles to change the width only.

3. Drag the handle. If you drag quickly, you will see only the bounding box of the object $B$.
or
Press and hold for a moment and then drag the handle. This shows a preview of the object as you resize the bounding box c .

TIP Hold down the Shift key as you drag a corner to keep the original proportions of the width and height.

TIP Hold the Cmd/Ctrl key as you drag to scale the frame as well as any text and images inside the object.
4. Release the mouse button when the object is the correct size.


Use the bounding box handles to resize an object.


B If you drag quickly, you only see a box as you resize an object.


If you press and pause a moment, you see an actual preview as you resize an object.

## Resizing or Scaling?

Although you and I might feel the words are the same, InDesign treats them differently. When you resize an object, you change its width or height. The amount of scaling stays the same in the Control panel or the Transform panel. You have to resize the object again to get it back to its original size.

When you scale an object, the width and height change, and the amount of scaling applied to the object is shown in the Scale fields in the Conthe object is shown in the Scale fields in the Con-
trol panel or Transform panel. You can convert the object back to its original size by setting the scaling to $100 \%$.


## Toto ran over to the trees and began to bark at the birds sitting there

D Objects selected with the Selection tool have both the object and its content transformed by the transform tools.


E Objects selected with the Group Selection tool have only the object transformed by the transform tools.


The indicator that the reference point can be moved to a new position.

## Using the Transform Tools

The transform tools resize and distort objects. You can transform the object itself (also called the container) or the object as well as any content. How you select objects changes the effect of the transform tools.

## To control the effect of the transform tools:

Select the object using the Selection tool. This type of selection causes the transform tools to affect both the container and any text or images inside it $D$.
or
Hold the Opt/Alt key as you click the frame with the Group Selection tool (Direct Selection tool). This causes the transformation to affect only the container, not any text or images contained in the frame E.

TilP The plus (+) sign next to the Direct Selection tool indicates that the tool is now the Group Selection tool.

All the transformations take place in relation to a reference point. Each object has a default reference point, but you can change it if necessary.

## To control the reference point:

1. Select the object to be transformed.
2. Choose one of the transform tools. A reference point appears inside the object.
3. Move the cursor near the reference point. A small icon appears next to the cursor that indicates you can move the reference point $F$.
4. Drag the reference point to a new position.
or
Click to position the reference point in a new position.

The Scale tool lets you increase or decrease the size of objects.

## To scale objects visually using the Scale tool:

1. Select the object or objects.
2. Choose the Scale tool in the Tools panel A. The Scale tool is in the flyout menu under the Free Transform tool.
3. If necessary, change the position of the reference point.
4. Move the cursor away from the reference point, and drag to scale the object $B$.

TIIP Hold down the Shift key to constrain the tool to horizontal, vertical, or proportional scaling.

TTIP To see a preview of the image as you scale, press and hold the mouse button for a moment before you start to drag.

TIIP Hold down the Opt/Alt key to copy the object as you scale it.

If you prefer, you can resize objects numerically using the Scale command.

## To scale objects using the Scale command:

1. Select the object or objects.
2. Choose Object $>$ Transform $>$ Scale. This opens the Scale dialog box $c$.
3. Enter an amount for the Scale $X$ (horizontal) field.
4. Enter an amount for the Scale Y (vertical) field.
tilp If the chain icon is selected, the $X$ and $Y$ fields scale the same amounts.
5. Select the Preview checkbox to see the effects of entering the amounts.
6. Click OK to scale the object or click Copy to create a scaled copy of the object.


A The Scale tool in the Tools panel is used to change the size of objects.


B The arrowhead appears while scaling an object.

c The Scale dialog box lets you scale objects using numerical values.

## Making Copies as You <br> Scale, Rotate, and Shear

As you use the Scale, Rotate, and Shear tools, you can duplicate the object as you transform it. Drag, as usual, to start the transformation, but then add the Opt/Alt key after you start the drag. You will see the double-headed arrow that indicates you are duplicating the object.
Release the mouse button first, and then the Opt/Alt key to finish the transformation and duplication.


D The Rotate tool in the Tools panel is used to change the orientation of objects.


Rotating an object around its reference point.

| Rotate |  |
| ---: | :--- |
| Angle: $45^{\circ}$ | OK |
|  | $\square$ Cancel |
|  | Copy |
|  |  |
|  |  |

F The Rotate dialog box lets you rotate objects using numerical values.

## To scale objects numerically using the Scale tool:

1. Select the object or objects.
2. Choose the Scale tool in the Tools panel.
3. Hold the Opt/Alt key and click to designate the position of the reference point. This opens the Scale dialog box c.
4. Set the dialog box controls as described in the previous exercise.

The Rotation tool changes the orientation, or angle, of the object on the page.

## To rotate objects visually using the Rotate tool:

1. Select the object or objects.
2. Click the Rotate tool in the Tools panel D. The Rotate tool is in the flyout under the Free Transform tool.
3. If necessary, change the default reference point.
4. Move the cursor away from the reference point, and drag to rotate the object E.

TIP Hold down the Shift key to constrain the rotation to 45 -degree increments.

## To rotate objects using the Rotate command:

1. Select the object or objects.
2. Choose Object > Transform > Rotate. This opens the Rotate dialog box $\mathbf{F}$.
3. Use the Angle field to set how much the object should rotate.
4. Select the Preview command to see the effects of entering the angle.
5. Click OK to rotate the object or click Copy to create a copy as you rotate the object.

## To rotate objects numerically using the Rotate tool:

1. Select the object or objects.
2. Choose the Rotate tool in the Tools panel.
3. Hold the Opt/Alt key and click to set the position of the reference point. This opens the Rotate dialog box.
4. Set the dialog box controls as described in the previous exercise.

The Shear tool distorts the shape of objects.

## To shear objects visually using the Shear tool:

1. Select the object or objects.
2. Click the Shear tool in the Tools panel A. The Shear tool is in the flyout under the Free Transform tool.
3. If necessary, drag the reference point to a new position. The cursor indicates the reference point can be moved.
4. Move the cursor away from the reference point, and drag to shear the object $B$.

## To shear objects using the Shear command:

1. Select the object or objects.
2. Choose Object > Transform > Shear. This opens the Shear dialog box $c$.
3. Use the Shear Angle field to set the amount of distortion.
4. Select one of the Axis options:

- Horizontal shears along the horizontal axis.
- Vertical shears along the vertical axis.

5. Select the Preview command to see the effects of entering the shear angle and choosing the axis.
6. Click OK to shear the object.

## or

Click Copy to create a sheared copy of the object.


Use the Shear tool in the Tools panel to distort objects.


Shearing an object around the reference point.

| Shear |  |
| :--- | :---: |
| Shear Angle: $20^{\circ}$ |  |
|  |  |
| Axis <br> O Horizontal <br> O Vertical |  | | Cancel |
| :---: |

c The Shear dialog box lets you distort objects using numerical values.


D Choose the Free Transform tool in the Tools panel to scale, rotate, and shear objects.


E The double-headed arrow indicates that the Free Transform tool is in the scale mode.


The curved double-headed arrow indicates that the Free Transform tool is in the rotation mode.

## To shear objects numerically using the Shear tool:

1. Select the object or objects.
2. Choose the Shear tool in the Tools panel.
3. Hold the Opt/Alt key and click to set the position of the reference point. This opens the Shear dialog box c.
4. Set the dialog box controls as described in the previous exercise.

Rather than switching between the Scale, Rotate, and Shear tools, you can use the Free Transform tool to scale, rotate, or shear an object.

## To use the Free Transform tool:

1. Select the object or objects.
2. Click the Free Transform tool in the Tools panel D. A bounding box appears around the object.
3. To scale the object, place the cursor over one of the handles. The cursor changes to a straight double-headed arrow E.
or
To rotate the object, place the cursor outside one of the handles of the bounding box. The cursor changes to a curved double-headed arrow F.
or
To skew the object, drag one of the handles and then hold the $\mathrm{Cmd} / \mathrm{Ctrl}$ key after you have started the drag. The cursor does not change appearance, but the object will be sheared.
4. Release the mouse button to apply the transformation.

Tilf
You can also scale or rotate an object using the Selection tool and dragging a corner of the object.

## Using the Transform Panel

The Transform panel allows you to move, scale, rotate, and shear objects precisely, using numerical values.

TIP When you have objects selected, the Control panel displays many of the controls that are found in the Transform panel.

## To open the Transform panel:

Choose Window > Object \& Layout > Transform to open the panel A.
or
If the Transform panel is behind other panels, click the Transform panel tab.

As you work with the Transform panel, it is important to know its reference point on the object. This is the same as the reference point used with the transform tools.

## To set the Transform panel reference point:

1. Select the object or objects that you want to transform.
2. Click the reference point control on the Transform panel to choose the point around which the object moves $B$.


The Transform panel is a command center for positioning and transforming objects.


B The reference point controls where in the object the transformation occurs.

## Transform


c The $X$ and $Y$ fields in the Transform panel control the position of an object.


D The W and H fields in the Transform panel control the width and height of objects.

You can use the Transform panel to move objects numerically.

## To move an object with the Transform panel:

1. Select the object or objects that you want to move.
2. To move the object horizontally, enter an amount in the X field C .

ITP As you increase the numbers, the object moves to the right.
3. To move the object vertically, enter an amount in the $Y$ field C .

ITP As you increase the numbers, the object moves down.
4. Press Enter or Return to apply the changes.

You can use the Transform panel to resize an object numerically.

## To resize with the Transform panel:

1. Select the object or objects.
2. If necessary, change the reference point as explained on the preceding page.
3. To change the width of the object, enter an amount in the W field D .
4. To change the height of the object, enter an amount in the H field D .
5. Press Enter or Return to resize the object.

You can resize proportionally even if you know the size for only one side of the object.

## To resize proportionally:

1. Select the object or objects.
2. Enter the new size in the W field or H field D .
3. Hold Cmd/Ctrl as you press Enter or Return. The amount in both the W and H fields changes proportionally.

You can also scale using the Transform panel.

## To scale with the Transform panel:

1. Select the object or objects.

TilP Use the Selection tool to scale the object and its contents. Use the Direct Selection tool to scale only the object.
2. If necessary, change the reference point.
3. To change the horizontal size, enter a percentage in the Scale $X$ field $A$.
4. To change the height of the object, enter a percentage in the Scale $Y$ field $A$.

TIP The Scale X and Y fields also have pop-up lists from which to choose the amount of scaling.
5. Press Enter or Return to apply the changes.

TIP You can also scale text within a text frame by dragging on the edge of the frame while holding the $\mathrm{Cmd} / \mathrm{Ctrl}$ key. Hold $\mathrm{Cmd} / \mathrm{Ctrl}-$ Shift and drag by a corner point to scale proportionally. This also applies to text frames in groups.

## To scale proportionally with the Transform panel:

1. Select an object or objects.
2. If the Link icon is in the open state, click to close it $B$.
3. Enter an amount in either the Scale $X$ or Scale $Y$ fields. You do not have to enter an amount in both fields. The closed Link icon forces both fields to display the same amount.
4. Press Enter or Return to apply the changes.

TIP Hold the Cmd/Ctrl key as you press the Enter or Return key to scale proportionally even if the Link icon is in the open state.


The Scale $X$ and $Y$ fields in the Transform panel let you apply percentage amounts to scale objects.

Closed state


B The Link icon in the closed state forces both the Scale $X$ and the Scale $Y$ fields to the same amount. In the open state, you can enter different amounts for the Scale $X$ and Scale $Y$ fields.

c The Rotation field in the Transform panel lets you change the angle of objects.

Object rotated
Object and content rotated

## athe Won- derful Wizard of $\mathrm{Oz}^{n}$

by L. Frank Baum Chapter One, The Cyclone


D The difference between rotating an object or rotating an object and its content.


E The Shear field in the Transform panel lets you distort the shape of objects.

Object sheared

## The Cyclone

Object and content sheared


F The difference between shearing an object or shearing an object and its content.

You can also rotate objects using the Transform panel.

## To rotate with the Transform panel:

1. Select the object or objects.

TIP Use the Selection tool to rotate the object and its contents. Use the Direct Selection tool to rotate only the object.
2. If necessary, change the reference point.
3. Enter the amount of rotation in the Rotation field c.

TIP The Rotation field also has a pop-up list from which to choose the amount of rotation.
4. Press Enter or Return to apply the changes D.

You can also shear objects using the Transform panel.

## To shear with the Transform panel:

1. Select the object or objects.

TIIP Use the Selection tool to shear the object and its contents. Use the Direct Selection tool to shear only the object.
2. If necessary, change the reference point.
3. Enter the amount of distortion in the Shear field $\mathbf{E}$.

TIP The Shear field also has a pop-up list from which to choose the amount of shearing.
4. Press Enter or Return to apply the changes F .

## Using the Transform

## Commands

In addition to the transform tools and transform fields, there are a whole bunch of transform commands you can use on objects. These commands make it easy to perform commonly used transformations, such as rotating and flipping objects.

## To rotate with the transform commands:

1. Select an object or objects.
2. Click to open the Transformation panel menu.
or
Choose Object > Transform.
3. Choose one of the rotation settings as follows A:

- Rotate $90^{\circ} \mathrm{CW}$ (clockwise).
- Rotate $90^{\circ} \mathrm{CCW}$ (counterclockwise).
- Rotate $180^{\circ}$.


## To flip objects using the transform commands:

1. Select an object or objects.
2. Click to open the Transform panel menu.
or
Choose Object > Transform.
3. Choose one of the flip settings as follows ${ }^{B}$ :

- Flip Horizontal.
- Flip Vertical.


Circle moved to new position


Transform Again command applied to triangle
c The Transform Again command allows you to duplicate transformation commands applied to objects.


Transform Again
applied to two


Transform Again Individually applied to two triangles


D The differences between the Transform Again command and the Transform Again Individually command when applied to multiple objects.

When you perform a transformation on an object, that transformation is stored in InDesign's memory. You can then perform the same transformation again on another object — even in another document! This is similar to Illustrator's Transform Again command.

## To repeat transformations:

1. Use any of the transform commands on a selection.
2. Select a different object or objects.
3. Choose one of the following from the Object > Transform Again submenu.

- Transform Again applies the last single transform command to the selection as a whole C.
- Transform Again Individually applies the last single transform command to each object in the selection $\mathbb{D}$.
- Transform Sequence Again applies the last set of transformation commands to the selection as a whole.
- Transform Sequence Again Individually applies the last set of transformation commands to each object in the selection.

InDesign remembers all the transformation commands until you select a different object or perform a different task.

InDesign can even remember an Opt/Alt-drag transformation that duplicated an object.

## Using the Arrange Commands

Objects in InDesign are layered on top of one another in the same order they were created. (This is sometimes called the stacking order.) The first object created is behind the second, the second behind the third, and so on. Though you may not see the layering when objects are side by side, it is apparent when they overlap A.

TIP The layering of objects is not the same as the layers of a document. (See Chapter 11, "Layers," for more information on working with layers.)

The Arrange commands allow you to move objects through the stacking order.

## To move up or down one level in a stack:

1. Select the object you want to move.
2. Choose Object $>$ Arrange $>$ Bring Forward to move the object in front of the next object in the stacking order ${ }_{B}$.
or
Choose Object > Arrange > Send
Backward to move the object behind the next object in the stacking order c.

## To move up or down the entire stack:

1. Select an object you want to move.
2. Choose Object $>$ Arrange $>$ Bring to Front to move the object in front of all the others in its layer D.
or
Choose Object > Arrange > Send to Back to move the object behind all the others in its layer $\mathbf{E}$.


A When two objects overlap, it is obvious which object is in front of the other.


B Effects of the Bring Forward command.

c Effects of the Send Backward command.


D Effects of the Bring to Front command.


E Effects of the Send to Back command.


F Use the Align panel to arrange objects in an orderly fashion.

| Align To: |  |
| :--- | :--- |
| Distribute Spacing: | Align to Selection <br> Align to Key Object |
| $=$Align to Margins |  |
| $\nabla$ Use Spacing | Align to Page <br> Align to Spread |

G The Alignment menu lets you choose how the objects should be aligned.


H Effects of the vertical alignment icons.


- Effects of the horizontal alignment icons.


## Aligning Objects

The Align panel provides commands that align objects or distribute them evenly along a horizontal or vertical axis.

## To work with the Align panel:

1. Choose Window > Object \& Layout > Align. This opens the Align panel F.
2. Choose Show Options from the Align panel menu to see all the commands in the panel.

## To align objects:

1. Select two or more objects.
2. Use the Alignment menu to choose to what items the objects should align ${ }^{\text {G }}$.

- Align to Selection uses the objects themselves for alignment.
- Align to Key Object lets you designate a specific object to which the others align. (See the next exercise for how to designate the key object.)
- Align to Margins uses the margins for alignment.
- Align to Page uses the page trim for alignment.
- Align to Spread uses the size of the spread for alignment.

3. Click an alignment icon as follows:

- Click a vertical alignment icon to move the objects into left, centered, or right alignment H .
- Click a horizontal alignment icon to move the objects into top, centered, or bottom alignment I.

TIP The align commands move objects based on the best representation of the controls. For instance, the Align Left command uses the leftmost object; Align Top uses the topmost object, and so on.

## To align to a key object:

1. With the objects selected, choose Align to Key Object from the Alignment menu. A thick border appears around one of the selected objects A.
2. Click another object. The thick border appears around that object. That is the new key object.
3. Click one of the alignment options in the Align panel. The objects align to the designated key object.

You can also move objects so the spaces between certain points of the objects are equal. This is called distributing objects.

## To distribute objects:

1. Select three or more objects.
2. Click a distribute icon as follows:

- Click a vertical distribute icon to move the objects so that their tops, centers, or bottoms are equally distributed $B$.
- Click a horizontal distribute icon to move the objects so that their left edges, centers, or right edges are equally distributed c .

You can also distribute objects based on their size. This ensures that the space between the objects is equal.

## To distribute the space between objects:

1. Select three or more objects.
2. Click a distribute space icon as follows:

- Click the vertical space icon to move objects so the vertical spaces between them are equal D .
- Click the horizontal space icon to move objects so the horizontal spaces between them are equal $E$.


The designated key object is indicated by a thick border.

| Original |
| :--- |
| objects |


| Distribute |
| :--- |
| tops | | Distribute |
| :--- |
| centers |$\quad$| Distribute |
| :--- |
| bottoms |

B Effects of the vertical distribute icons. Notice that the middle object changes position to create an even distribution.

c Effects of the horizontal distribute icons. Notice that the middle object changes position to create an even distribution.


D Effect of the vertical distribute space icon．

Original
objects



Distribute horizontal space



E The effect of the horizontal distribute space command．

## Distribute Objects：



F The Use Spacing option for Distribute Objects lets you set a specific distance between the tops，centers， bottoms，or sides of objects．

## Distribute Spacing：

－ㅁ ㅂㅁ
$\checkmark$ Use Spacing $-\boldsymbol{\sim} \rightarrow 0$
G The Use Spacing option for Distribute Spacing lets you set a specific distance between objects．

The Align panel also has controls to space objects numerically．You can apply a numeri－ cal distance between the tops，centers，bot－ toms，or sides of objects．

## To use spacing to distribute objects：

1．Select two or more objects．
2．Select Use Spacing in the Distribute Objects section of the Align panel F．

3．Enter the numerical distance in the Use Spacing field．

4．Click one of the Distribute Objects icons． Now the objects are separated by a specific space inserted between the tops， centers，bottoms，or sides of the objects．

TIP If a positive number moves the objects in the wrong direction，use a negative number．

You can also set a specific numerical distance between the objects themselves．This is very useful when you want the same amount of space between objects，but the objects them－ selves have different sizes．

## To set the spacing between objects：

1．Select two or more objects．
2．Select Use Spacing in the Distribute Spacing section of the Align panel $G$ ．
3．Enter the numerical distance in the Use Spacing field．

4．Click one of the Distribute Spacing icons． Now a specific amount of space is added between the objects horizontally or vertically．

TIP
If a positive number moves the objects in the wrong direction，use a negative number．

## Smart Dimensions; Smart

## Spacing

Just as Smart Guides can align to margins and objects, they also give you feedback that can help you create an object that is the same size as another object on the page.

## To show or hide Smart Guides:

Choose Window > Grids \& Guides > Smart Guides. This turns the Smart Guides on or off.

One of the options for Smart Guides is the Smart Dimensions feature. This helps you create objects that have the same width or height.

## To create objects with the same dimensions:

1. Create one object that has a certain width or height.
2. Drag to create a new object. As you drag, watch for a dimension arrow that appears next to the width or height $A$. This is the Smart Dimension indicator that says the two objects have the same dimension.

Another option for Smart Guides is the Smart Spacing feature. This makes it easy to evenly distribute objects so that the spaces between them are equal.

## To position objects with the same spacing:

1. Create two objects that have a certain space between them.
2. Position a third object on the page. As you drag, watch for the Smart Spacing indicators that appear between the objects $B$. This indicates that the three objects are spaced evenly.


A The Smart Dimension indicators appear when an object is the same width or height as another.


B The Smart Spacing indicators appear when an object is the same distance away from one object as it is from another.


The Gap tool in the Tools panel changes the size of objects without affecting the size of the space between the objects.


D As the Gap tool drags between two objects, the size of the objects changes while the size of the gap remains constant.


E When the Shift key is pressed, the Gap tool effect is applied only to the two objects closest to the cursor.

## Using the Gap Tool

Gaps are the spaces between objects. There may be times when you want to change the size of two objects, but keep the same amount of space (gap) between them. The Gap tool makes it very easy to change the width or height of the objects without affecting the size of the gap between them.

TIP The Gap tool can work on either horizontal or vertical gaps.

To use the Gap tool to resize objects:

1. Select the Gap tool in the Tools panel c.
2. Move the cursor inside the space between two objects. A gray highlight and doubleheaded gap cursor appear. This indicates that the gap space has been selected.
3. Drag the cursor up and down for horizontal gaps or left and right for vertical gaps. The gap remains constant while the sizes of the objects change D .
4. Use the following modifiers to change how the Gap tool works:

- Hold the Shift key to apply the effects of the Gap tool to only the two objects closest to the cursor E .
- Hold the $\mathrm{Cmd} / \mathrm{Ctrl}$ key to resize the gap instead of moving it.
- Hold the Opt/Alt key to move the objects and the gap without changing their sizes.
- Hold the Cmd+Opt/Ctrl+Alt keys to resize the gap and move the objects.

The Gap tool can be applied even if there is no space between two objects. The Gap tool then modifies the size of the objects without opening any space between them.

## Grouping and Pasting Into Objects

You can group objects so you can easily select and modify them as a unit.

## To group objects:

1. Select the objects you want to group.
2. Choose Object > Group. A dotted-line bounding box encloses all the objects $A$.

You can also create groups within groups. This is called nesting.

## To nest groups:

1. Select the grouped objects.
2. Hold the Shift key and select another object or group.
3. Choose Object > Group.

Once you have grouped objects, you can select individual objects within the group.

## To select groups or objects within groups:

Click once on any item in the group. The group is selected as a whole.
or
Double-click to select a specific item in the group B .

TilP The first double-click may act like the Direct Selection tool and select just part of the object. If this happens, double-click again to select the entire item.


Woodman

## Lion ${ }^{2}$ lems

A When selected with the Selection tool, grouped items display a dashed line around the group.


## Dorothy

## Auntie En <br> Single item selected <br> Uncle Hency:

B When selected with the Direct Selection tool, a single item in a group is displayed on its own.

c
An object to be pasted into another should be positioned over the other.


D The Paste Into command displays the content only within the borders of the container.

## To use commands to select objects within groups:

1. Use the Selection tool to select the group.
2. Choose Object $>$ Select $>$ Content. This selects the topmost object in the group.
3. Choose Object $>$ Select $>$ Previous Object. This selects the object that is layered below the selected object.
or
Choose Object > Select > Next Object. This selects the object that is directly above the selected object.

## To ungroup objects:

1. Select the group.
2. Choose Object > Ungroup.
3. If you have nested groups, continue to ungroup the objects as necessary.

You can also paste an object into a frame. InDesign refers to the object that is pasted as the content. It refers to the frame that holds the object as the container.

## To paste an object into another:

1. Select the first object and position it over the second object c.
2. Choose Edit > Cut to place the first object on the computer clipboard.
3. Select the second object and choose Edit > Paste Into. The content appears within the borders of the container D.

TITP To paste multiple objects, group the objects together.

## To remove pasted-in content:

1. Use the Direct Selection tool to select the pasted-in content.
2. Choose Edit > Cut.

Tilp The pasted-in content can be placed back on the page by choosing Edit > Paste.

## Using the Measure Tool

There are many places where you can find the numerical sizes of items. But what if you want to measure the distance to another item? That's where the Measure tool is so helpful.

## To measure distances using the Measure tool:

1. Choose Window > Info to open the Info panel.

TTIP All amounts measured by the Measure tool are displayed in the Info panel.
2. Click the Measure tool in the Tools panel A. The Measure tool is in the flyout menu under the Eyedropper tool.
3. Place the Measure tool on the start point and drag to the end point. A measuring line appears on the page B. The Info panel displays the following attributes c :

- Horizontal position displays the X coordinate of the first point in the line or whichever point is then moved.
- Vertical position displays the $Y$ coordinate of the first point in the line or whichever point is then moved.
- Distance shows the length of the line.
- Width shows the width of the bounding box that would enclose the line.
- Height shows the height of the bounding box that would enclose the line.
- Angle shows the angle on which the line was drawn.


A The Measure tool in the Tools panel.


B Drag the Measure tool to measure the distance between two points.

c The measurements displayed in the Info panel for the measuring line drawn with the Measure tool.


Drag the line segment of the measuring line to move it to a new position.


E The angle cursor indicates that you are about to create a second measuring line.


F
Two measuring lines let you measure angles with the Measure tool.


G The Info panel display for two measuring lines.

Once you have drawn a measuring line, you can move it to other areas of the page.

## To move a measuring line:

1. With the Measure tool still selected, position the cursor over the measuring line.
2. Drag the line to a new position (D.

TIPP Do not position the cursor over the start or end points of the measuring line.

You can also change the start or end points of the measuring line.

## To reposition the points of the measuring line:

1. With the Measure tool still selected, position the cursor over either point in the measuring line.
2. Drag the point to a new position.

You can also extend a second line out from the origin of the measuring line to create an electronic protractor to measure angles.

## To measure angles:

1. Drag the first line with the Measure tool.
2. Hold the Opt/Alt key and move the Measure tool back to the origin of the first line. An angle cursor appears E.
3. Drag to create a second line extending out from the origin point F. The Info panel displays the distance of the second line, as well as the angle between the measuring lines $\mathbf{G}$.

TIP No bounding box is displayed when two measuring lines are created.

## Using the Info Panel with Objects

The Info panel also gives you information about the document, text, and placed images.

## To see the document information:

Deselect any objects on the page. The Info panel displays the following A:

- Location of the file on the computer.
- Last Modification date and time.
- Author as entered in the File Info (File > File Info) dialog box.
- File size.


## To see the text information:

Place your insertion point inside a text frame or highlight the text in the frame. The Info panel displays the following B:

- Characters in the frame or selection.
- Words in the frame or selection.
- Lines in the frame or selection.
- Paragraphs in the frame or selection.

TIP If there is any overset text, it is displayed as a number with a plus sign.

## To see the placed object information:

Select a frame that contains a placed image, or the placed image itself. The Info panel displays the following c :

- Type of placed image.
- Actual ppi (points per inch) resolution of the image.
- Effective ppi resolution of the image if you have scaled it in InDesign.
- Color Space of the image.
- ICC Profile (if applicable) may also be shown.


With no objects selected, the Info panel displays document information.


B With text selected, the Info panel displays text information.

c With a placed image selected, the Info panel displays placed image information.


D The Padlock cursor indicates that the Lock Position command has been applied.


An object that is locked and that has also been selected.

## Object Editing

- Prevent Selection of Locked Objects

F Deselect the preference Prevent Selection of Locked Objects to be able to select locked objects.

## Locking Objects

You can also lock objects so they cannot be moved or modified. This prevents people from inadvertently destroying your layout.

## To lock the position of an object:

With the object you want to lock selected, choose Object > Lock Position. A small padlock appears if you try to move or modify the object D.

## To unlock objects:

Choose Object > Unlock All on Spread. This unlocks the objects and leaves them selected on the page.

TIIP In previous versions of InDesign, locked objects were locked only for position. You could still select and change the colors and contents of locked objects E. If you want InDesign to work this older way, choose Preferences > General and deselect the option Prevent Selection of Locked Objects F .

## Selecting Frames

Use this chart as a guide to let you know what type of object you have selected and which parts of the object can be selected using the Selection tool or the Direct Selection tool.

## Unassigned frames



## Graphic frames with a placed image

For more information on working with placed images, see Chapter 8, "Imported Graphics."

| Not selected. | Frame selected with Selection <br> tool. Notice the bounding box for <br> the frame. | Frame selected with Direct <br> Selection tool. Notice there is no <br> bounding box but the points are <br> selected. |
| :--- | :--- | :--- | | ontent selected with Direct |
| :--- |
| Selection tool. Notice that the color |
| of the bounding box for the placed |
| image is the inverse of the color of |
| the frame's bounding box. |

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