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CS4 Tasks ▶



Adobe®

InDesign® CS4

1 2 3 4 5 6 7 **on Demand**

What you need, when you need it!

que®

Steve Johnson, Perspection, Inc.

Adobe® InDesign® CS4 On Demand

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Introduction

Welcome to *Adobe InDesign CS4 On Demand*, a visual quick reference book that shows you how to work efficiently with InDesign. This book provides complete coverage of basic to advanced InDesign skills.


How This Book Works

You don't have to read this book in any particular order. We've designed the book so that you can jump in, get the information you need, and jump out. However, the book does follow a logical progression from simple tasks to more complex ones. Each task is presented on no more than two facing pages, which lets you focus on a single task without having to turn the page. To find the information that you need, just look up the task in the table of contents or index, and turn to the page listed. Read the task introduction, follow the step-by-step instructions in the left column along with screen illustrations in the right column, and you're done.

What's New

If you're searching for what's new in InDesign CS4, just look for the icon: **New!**. The new icon appears in the table of contents and throughout this book so you can quickly and easily identify a new or improved feature in InDesign. A complete description of each new feature appears in the New Features guide in the back of this book.

Keyboard Shortcuts

Most menu commands have a keyboard equivalent, such as Ctrl+P (Win) or +P (Mac), as a quicker alternative to using the mouse. A complete list of keyboard shortcuts is available on the Web at www.perspection.com.



How You'll Learn

How This Book Works

What's New

Keyboard Shortcuts

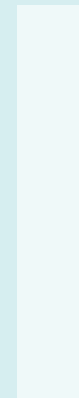
Step-by-Step Instructions

Real World Examples

Workshops

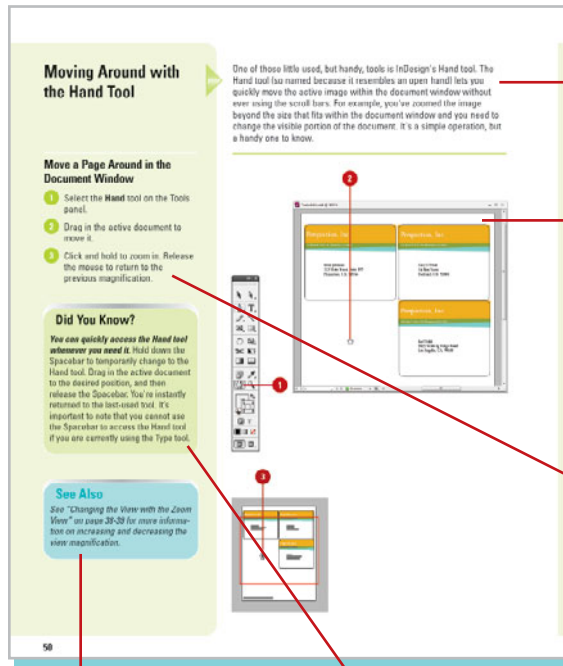
Adobe Certified Expert

Get More on the Web



Step-by-Step Instructions

This book provides concise step-by-step instructions that show you “how” to accomplish a task. Each set of instructions includes illustrations that directly correspond to the easy-to-read steps. Also included in the text are time-savers, tables, and sidebars to help you work more efficiently or to teach you more in-depth information. A “Did You Know?” provides tips and techniques to help you work smarter, while a “See Also” leads you to other parts of the book containing related information about the task.



Easy-to-follow introductions focus on a single concept.

Illustrations match the numbered steps.

Numbered steps guide you through each task.

See Also points you to related information in the book.

Did You Know? alerts you to tips, techniques and related information.

Real World Examples

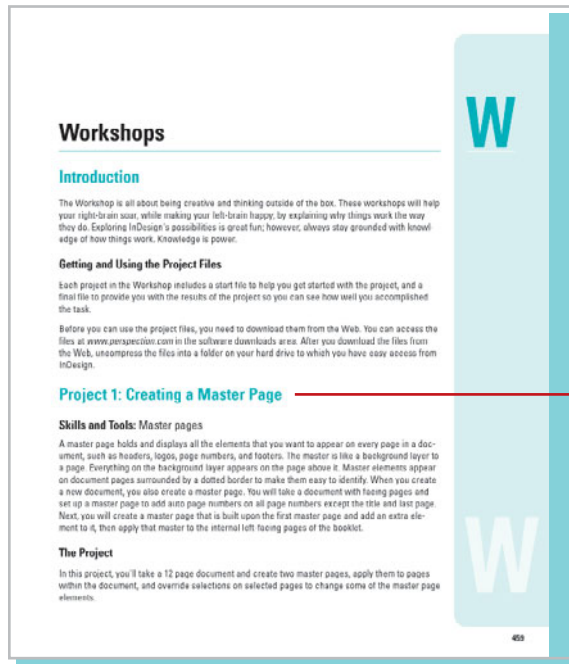
This book uses real world example files to give you a context in which to use the task. By using the example files, you won't waste time looking for or creating sample files. You get a start file and a result file, so you can compare your work. Not every topic needs an example file, such as changing options, so we provide a complete list of the example files used throughout the book. The example files that you need for project tasks along with a complete file list are available on the Web at www.perspective.com.



Real world examples help you apply what you've learned to other tasks.

Workshops

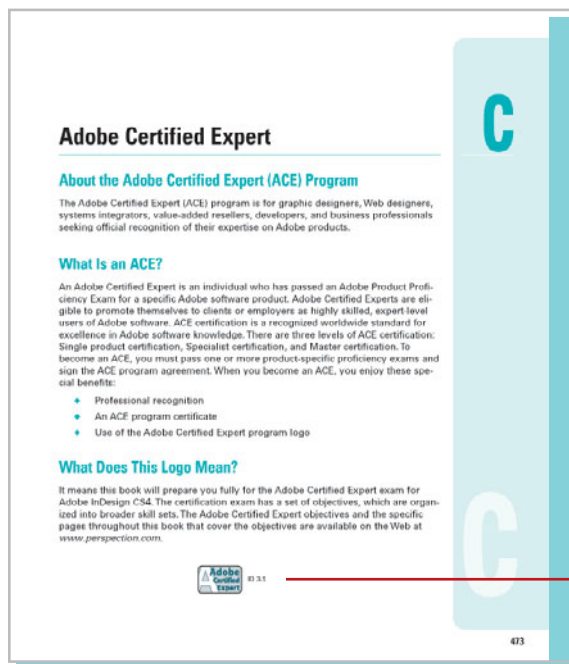
This book shows you how to put together the individual step-by-step tasks into in-depth projects with the Workshop. You start each project with a sample file, work through the steps, and then compare your results with a project results file at the end. The Workshop projects and associated files are available on the Web at www.perspection.com.



The Workshop walks you through in-depth projects to help you put InDesign to work.

Adobe Certified Expert

This book prepares you fully for the Adobe Certified Expert (ACE) exam for Adobe InDesign CS4. Each Adobe Certified Expert certification level has a set of objectives, which are organized into broader skill sets. To prepare for the certification exam, you should review and perform each task identified with a Adobe Certified Expert objective to confirm that you can meet the requirements for the exam. The Adobe Certified Expert objectives are available on the Web at www.perspection.com.



Logo indicates a task fulfills one or more Adobe Certified Expert objectives.

Get More on the Web

In addition to the information in this book, you can also get more information on the Web to help you get up-to-speed faster with InDesign CS4. Some of the information includes:

Transition Helpers

- ◆ **Only New Features.** Download and print the new feature tasks as a quick and easy guide.

Productivity Tools

- ◆ **Keyboard Shortcuts.** Download a list of keyboard shortcuts to learn faster ways to get the job done.

More Content

- ◆ **Photographs.** Download photographs and other graphics to use in your InDesign documents.
- ◆ **More Content.** Download new content developed after publication.

You can access these additional resources on the Web at www.perspective.com.

Keyboard Shortcuts

Adobe InDesign CS4

If a command on a menu includes a keyboard reference, known as a keyboard shortcut, to the right of the command name, you can perform the action by pressing and holding the first key, and then pressing the second key to perform the command quickly. In some cases, a keyboard shortcut uses three keys. Simply press and hold the first two keys, and then press the third key. Keyboard shortcuts provide an alternative to using the mouse and make it easy to perform repetitive commands.

If you're searching for new keyboard shortcuts in InDesign CS4, just look for the letter **N**. The **N** appears in the Keyboard Shortcuts table so you can quickly and easily identify new or changed shortcuts.

Keyboard Shortcuts		
Command	Windows	Macintosh
Main Commands		
Tools		
Selection tool	V, Esc	V, Esc
Direct Selection tool	A	A
Pen tool	Shift+A	Shift+A
Toggle Selection and Direct Selection tool	Ctrl+Tab	Command+Control+Tab
Pen tool	P	P
Add Anchor Point tool	=	=
Delete Anchor Point tool	-	-
Convert Direction Point tool	Shift+C	Shift+C
Type tool	T	T
Type On A Path tool	Shift+T	Shift+T
Pencil tool (Note tool)	N	N
Line tool	\	\

Additional content is available on the Web.

Managing Pages and Books

Introduction

Most documents are more than one page, so inserting new pages is a common practice in InDesign. You can quickly add a new blank page to a document using the Pages panel. The Pages panel allows you to visually display and navigate through all the pages in your document. When you work with multiple page documents, moving pages around is inevitable. You can simply drag pages in the Pages panel to rearrange them within a document or use the Move Page command on the Options menu to move them between documents. When you no longer need a page, you can quickly delete it from your document using the Pages panel.

A master page is one of the most important parts of creating an InDesign document. A master page holds and displays all the elements that you want to appear on every page in a document, such as headers, logos, page numbers, and footers. The master is like a background layer to a page. Everything on the background layer appears on the page in front of it. When you make a change to a master page, the change appears in all document pages unless you override the change.

Instead of creating long documents, you can break them up into smaller documents, like chapters, and then add them to a book. In InDesign, a book is not a single document. It simply keeps track of all the documents in the book and coordinates document page numbers, colors, and styles. When you create a book, you can synchronize page numbers, colors, and styles for all the documents in the book. Each book uses a file called the *style source* to control the style sheets, swatches, and master pages for all the documents in the book. When you make changes to the style source file, all the documents in the book are synchronized to the file.

What You'll Do

Use the Pages Panel

Insert Pages

Navigate Pages

Delete or Move Pages

Work with Page Spreads

Rotate Page Spreads

Create Master Pages

Work with Master Pages

Work with Page Numbers and Sections

Work with Chapter Numbers

Create and Use Text Variables

Create a Book

Manage Books

Create a Table of Contents

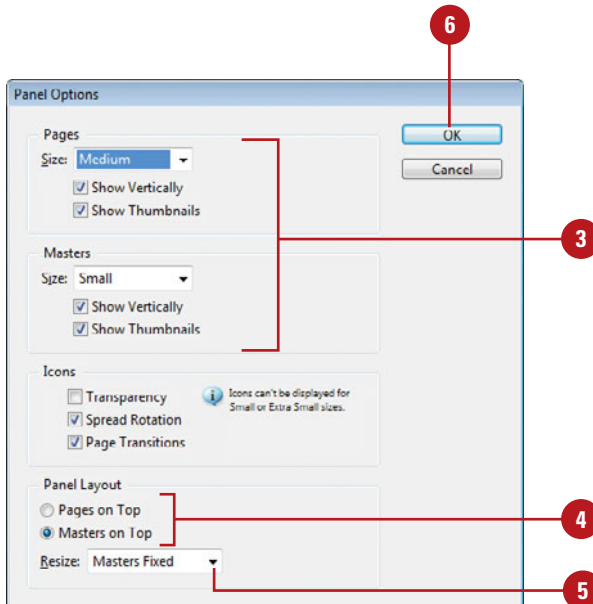
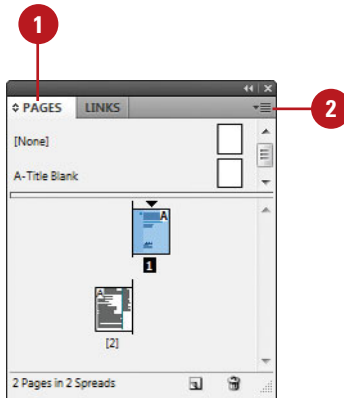
Adjust Layouts

Using the Pages Panel

The Pages panel allows you to visually display all the pages in your document. The Pages panel shows thumbnails for each page. At the top of the panel are the master pages for the document. A master page contains elements that are repeated on every page. When you're working with a multi-page document, the Pages panel is an essential part of working with pages. You can add and remove pages as well as navigate to and from pages. The Pages panel, like all panels, provides an Options menu where you can select page-related commands and Pages panel display options. The display options allow you to change page icons size, position, and location. In addition, you can also set options to show or hide icons for page transparency, transition, and spread rotation (**New!**).

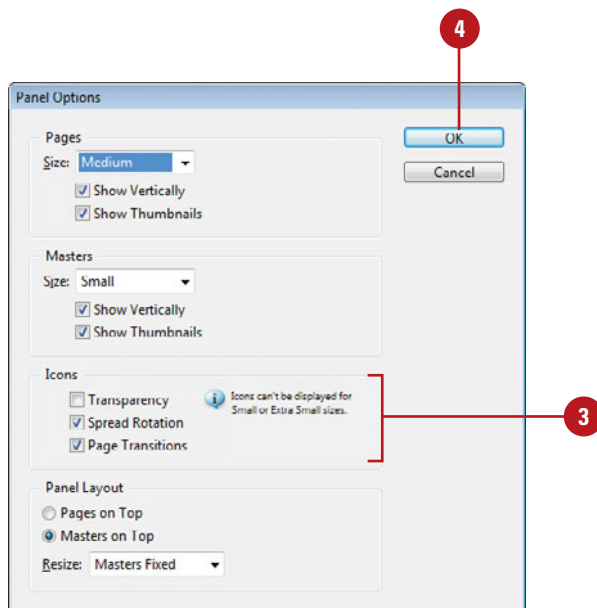
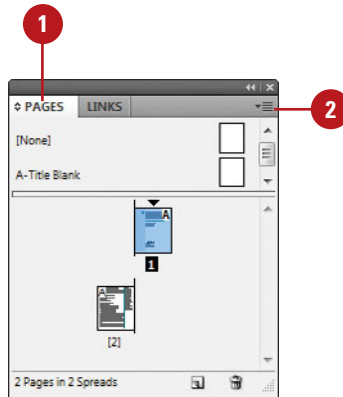
Change the Pages Panel Display

- 1 Select the **Pages** panel.
 - ◆ You can also click the **Window** menu, and then click **Pages**.
- 2 Click the **Options** menu on the panel, and then click **Panel Options**.
- 3 Select from the following Pages panel options:
 - ◆ **Size**. Specify an icon size for Pages and Masters.
 - ◆ **Show Vertically**. Select to show page or master page icons vertically.
 - ◆ **Show Thumbnails**. Select to show page or master page icons as thumbnails.
- 4 Click the **Pages on Top** or **Masters on Top** option.
- 5 Click the **Resize** list arrow, and then select an option when you resize the Pages panel.
- 6 Click **OK**.



Show or Hide Pages Panel Icons

- 1 Select the **Pages** panel.
 - ◆ You can also click the **Window** menu, and then click **Pages**.
- 2 Click the **Options** menu on the panel, and then click **Panel Options**.
- 3 Select from the following options for icon display:
 - ◆ **Transparency.** Select to display icons when transparency is applied to a page or spread.
 - ◆ **Spread Rotation.** Select to display icons when the spread view is rotated.
 - ◆ **Page Transitions.** Select to display icons when page transitions are applied to a page or spread.
- 4 Click **OK**.



Inserting Pages

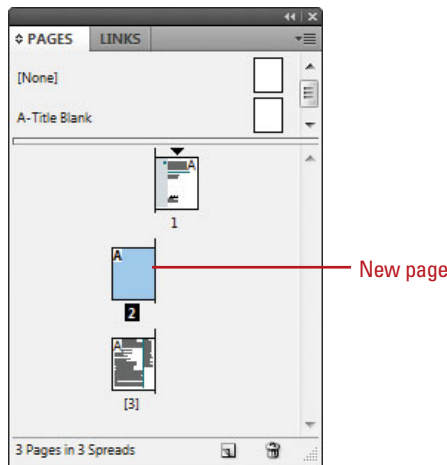
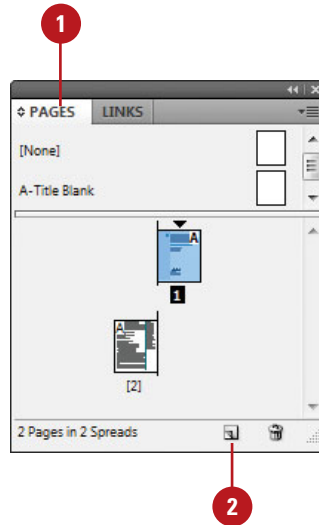
Insert Pages Using the Pages Panel

- 1 Select the **Pages** panel.
 - ◆ You can also click the **Window** menu, and then click **Pages**.
- 2 Use any of the following methods to insert a page:
 - ◆ **Insert Page.** Click the **Create New Page** button on the panel.
 - ◆ **Insert from Master Pages.** Drag a master page or a nonmaster page from the master page area to the document page area of the panel.
- 3 Continue to insert pages as needed.

Did You Know?

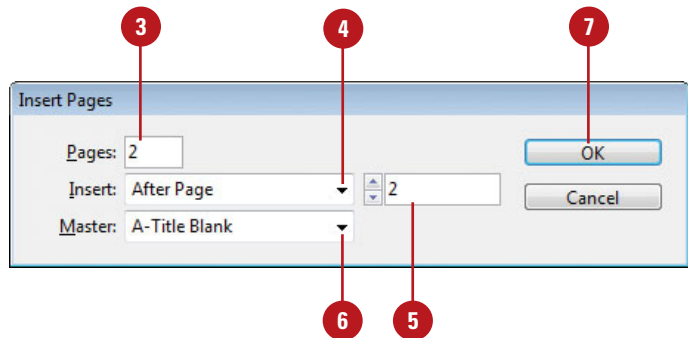
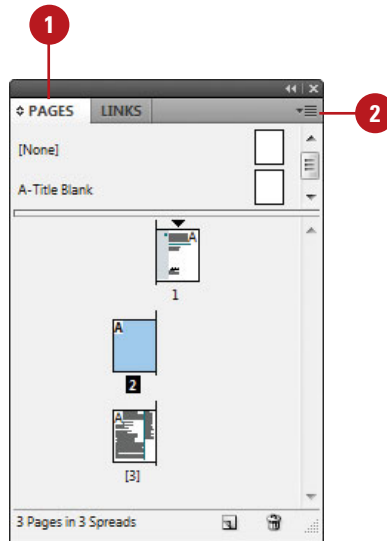
You can duplicate a page. Select the Pages panel, select the pages or spreads you want to duplicate, and then drag the selected pages to the Create New Page button on the panel or use the Duplicate Spread command on the Options menu.

Most documents will be more than one page, so inserting new pages is a common practice in InDesign. You can quickly add a new blank page to a document using the Pages panel. You have several different methods to complete the task. You can use the New Page button on the page, drag a master page to the document area in the Pages panel, or use the Insert Pages command on the Options menu. If you're inserting only one or two pages, the first two methods work the best. If you want to insert multiple pages, the Insert Pages command is your best option, where you can use the Insert Pages dialog box to set additional options.



Insert Multiple Pages Using the Insert Pages Dialog Box

- 1 Select the **Pages** panel.
 - ◆ You can also click the **Window** menu, and then click **Pages**.
- 2 Click the **Options** menu, and then click **Insert Pages**.
- 3 Enter the number of pages that you want to insert.
- 4 Click the **Insert** list arrow, and then specify how you want to insert the pages:
 - ◆ **After Page.** Inserts new pages after a specific page.
 - ◆ **Before Page.** Inserts new pages before a specific page.
 - ◆ **At Start of Document.** Inserts new pages at the start of the document.
 - ◆ **At End of Document.** Inserts new pages at the end of the document.
- 5 Specify the specific page to use when you choose After Page or Before Page as your Insert option.
- 6 Click the **Master** list arrow, and then select a master or nonmaster page to use as the basis for the new pages.
- 7 Click **OK**.

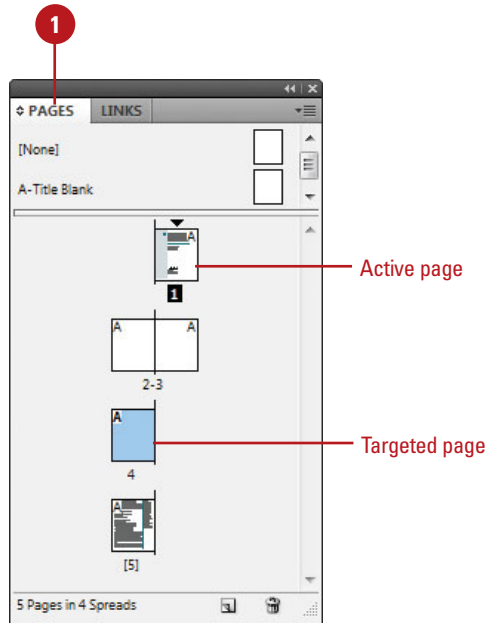


Navigating Pages

After you insert new pages into a document, you can use the Pages panel, Layout menu commands, and Status bar to navigate between them. As you work with pages in the Pages panel, there are two types of page selections. One targets a page and the other activates a page. A targeted page is a page selected in the Pages panel, while an activated page is a working page in the document window. When you target a page, you can apply a command in the Pages panel even though it may not be the current working page in the document window.

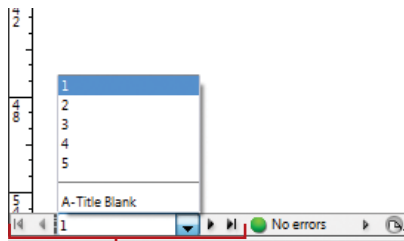
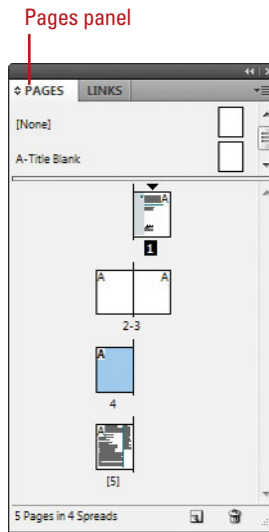
Target or Activate on a Page

- 1 Select the **Pages** panel.
 - ◆ You can also click the **Window** menu, and then click **Pages**.
- 2 Use any of the following methods to select a page:
 - ◆ **Target a Page.** Click a page in the Pages panel. The thumbnail is highlighted.
 - ◆ **Work on (Activate) a Page.** Double-click a page in the Pages panel. The thumbnail is highlighted and the page number or name below it is highlighted in black.



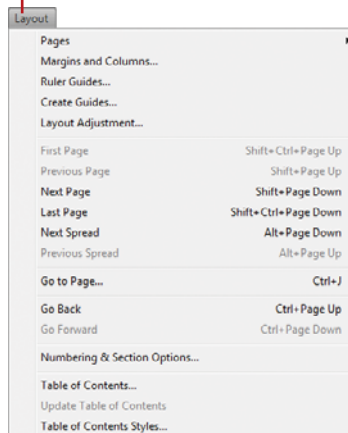
Navigate to Pages

- ◆ **Pages Panel.** Select the **Pages** panel, and then double-click the page in the panel that you want to work on.
- ◆ **Status Bar.** Use the navigation buttons on the Status bar to browse through pages or click the list arrow to select a specific page.
- ◆ **Layout Menu.** Click the **Layout** menu, and then select any of the following commands:
 - ◆ **First Page.** Displays the first page in the document.
 - ◆ **Previous Page.** Displays the previous page in the document.
 - ◆ **Next Page.** Displays the next page in the document.
 - ◆ **Last Page.** Displays the last page in the document.
 - ◆ **Next Spread.** Displays the next spread of pages in the document.
 - ◆ **Previous Spread.** Displays the previous spread of pages in the document.
 - ◆ **Go To Page.** Displays the specified page in the document.
 - ◆ **Go Back.** Displays the previously active page in the document.
 - ◆ **Go Forward.** Displays the previously active page before the use of the Go Back command.



Status bar with page navigation

Layout menu with page navigation



Deleting or Moving Pages

Delete Pages

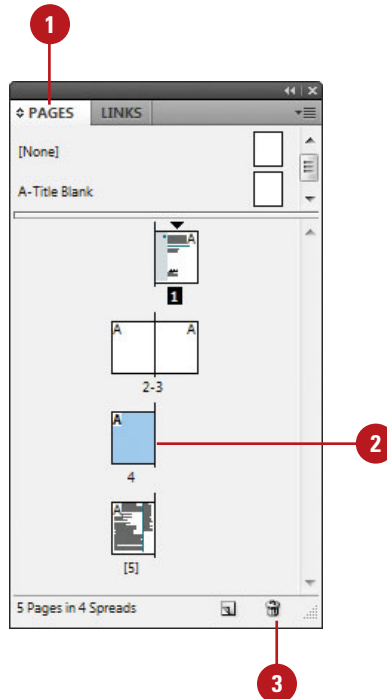
- 1 Select the **Pages** panel.
 - ◆ You can also click the **Window** menu, and then click **Pages**.
- 2 Select the pages that you want to delete.
 - ◆ You can use the Shift key to select contiguous pages or the Ctrl (Win) or ⌘ (Mac) to select noncontiguous pages.
- 3 Click the **Delete Page** button on the panel.
 - ◆ You can also click the **Options** menu, and then click **Delete Pages**.

IMPORTANT When you have a spread of pages selected, the button and command changes to **Delete Spreads**.

- 4 Click **OK** to confirm the deletion.

TIMESAVER Hold down the **Alt** (Win) or **Option** (Mac) key, when you select the **Delete Pages** button or command to bypass the confirmation dialog box.

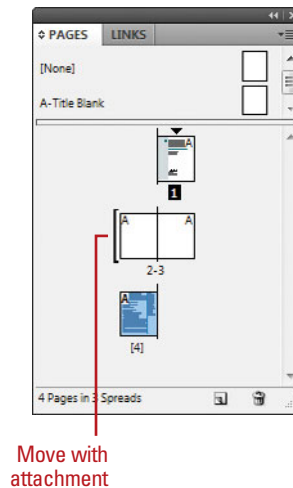
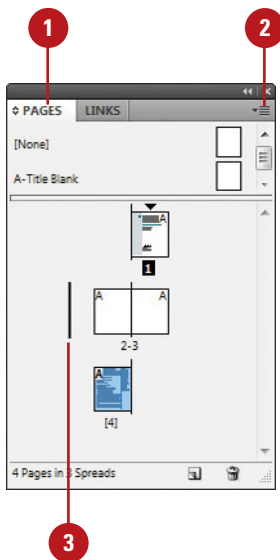
When you no longer need a page, you can delete it from your document using the Pages panel. You can use the Delete Page or Delete Spread button on the panel or the same command on the Options menu. Moving and arranging pages is a common part of working with multiple page documents. You can simply drag pages in the Pages panel or use the Move Page command on the Options menu. When you drag pages, the cursor indicates new page location. With the Move Page command, you can move pages within the current document or to another open document. When you move the pages, objects in the slug and bleed areas are also moved (**New!**). Page numbers in the slug area display a number rather than the pasteboard index entry (**New!**).



Move Pages by Dragging

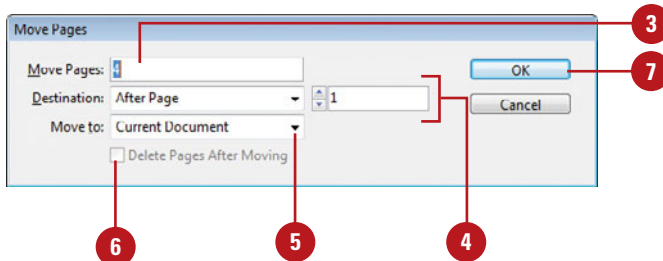
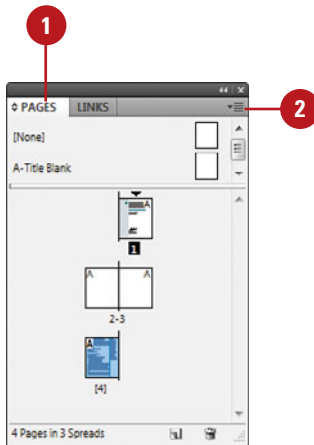
- 1 Select the **Pages** panel.
- 2 Click the **Options** menu, and then select a move related option:
 - ◆ **Allow Document Pages to Shuffle.** Enables or disables the shuffling of document pages.
 - ◆ **Allow Selected Spread to Shuffle.** Enables or disables the shuffling of selected spread pages.
- 3 Drag a page next to or between spread pages.

A straight black line indicates the move location with a shuffle. A bracket black line indicates the move location with attachment.



Move Pages

- 1 Select the **Pages** panel.
- 2 Click the **Options** menu, and then click **Move Pages**.
- 3 Specify the pages that you want to move. Use a hyphen to designate a range, such as 1-4.
- 4 Click the **Destination** list arrow, select an option, and then enter a page number, if necessary.
- 5 Click the **Move to** list arrow, and then select a document location.
- 6 If you are moving the page(s) to a separate open file, select the **Delete Pages After Moving** check box if you want to delete the pages from the current destination.
- 7 Click **OK**.



Working with Page Spreads

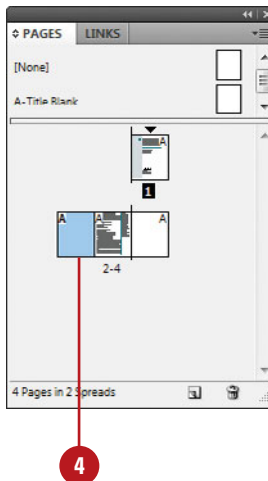
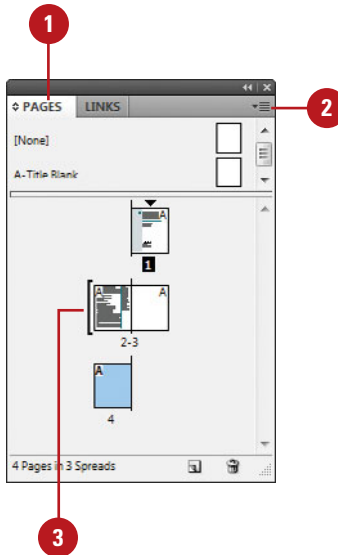
Add and Remove Pages from a Spread

- 1 Select the **Pages** panel.
- 2 Click the **Options** menu on the panel, and then click **Allow Document Pages to Shuffle** to deselect it.
- 3 To add pages, drag a page from the pages area, or a master page next to the spread where you want to add the page.
- 4 To remove pages, drag a page from the spread to outside of the spread, and then click **No**, if necessary.

Did You Know?

You can keep pages in a spread together. Select the Pages panel, select the spread you want to protect, click the Options menu, and then click Allow Selected Spread To Shuffle to deselect it.

Most documents are either one or two page spreads. A single-page spread displays pages one at a time (top to bottom), while a two-page spread displays pages as facing pages (left and right). If you want to create a larger spread for a magazine foldout or a brochure, you can add more pages to a one or two page spread. These multiple-page spreads are also called **island spreads**. When you no longer want a larger spread, you can remove pages from the spread.



Rotating Page Spreads

Rotate Page Spreads

- 1 Select the **Pages** panel.
- 2 Double-click the page numbers of the page spread you want to rotate.
- 3 Click the **Options** menu on the panel, point to **Rotate Spread View**, and then click **90° CW**, **90° CCW**, or **180°**.
 - ◆ You can also click the **View** menu, point to **Rotate Spread**, and then click **90° CW**, **90° CCW**, or **180°**.

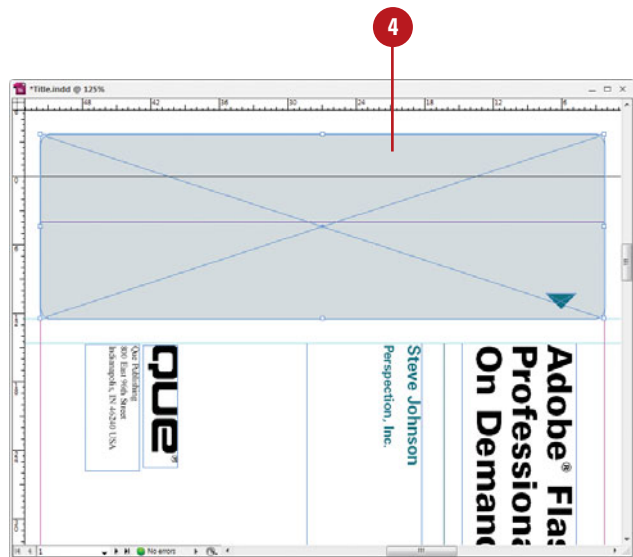
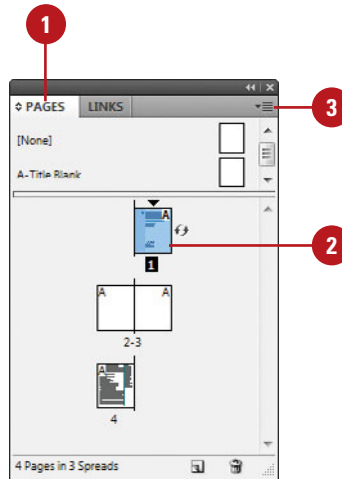
A rotation icon appears next to the page indicating the spread is rotated.

- 4 Edit and modify the page spread the way you want.
- 5 Click the **Options** menu on the panel, point to **Rotate Spread View**, and then click **Clear Rotation**.
 - ◆ You can also right-click (Win) or Control-click (Mac) the rotation icon to select a rotation spread command.

See Also

See "Using the Pages Panel" on pages 56-57 for more information on showing the spread rotation icon in the Pages panel.

If you need to work on non-horizontal design elements, such as a calendar, you can rotate the current spread in 90 degree increments (**New!**) to make it easier to work on. When you rotate the current spread view, you have full editing capabilities. When you're done, you can quickly clear the rotation to return to a normal view.



Creating Master Pages



ID 1.1, 2.11

Add Objects to an Existing Master Page

- 1 Select the **Pages** panel.
 - ◆ You can also click the **Window** menu, and then click **Pages**.
- 2 Double-click the master page in the master page area of the Pages panel.

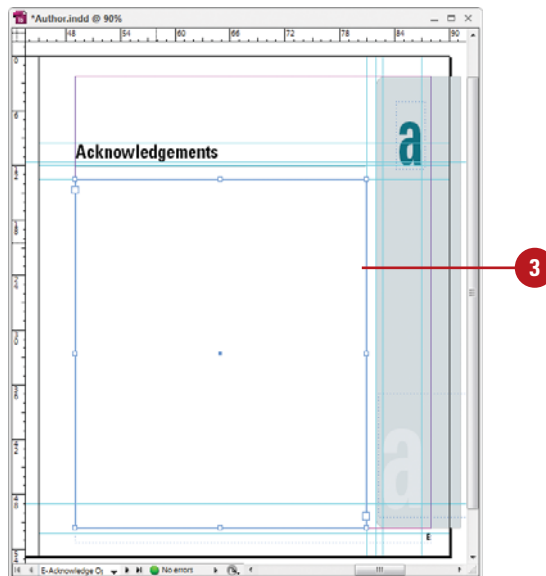
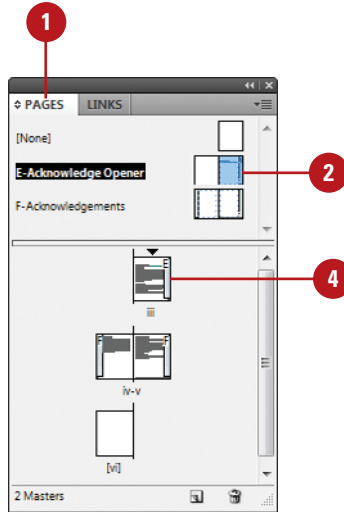
The master page or two page spread appears in the document window.
- 3 Add text boxes, graphics, or any other elements you want on the page.
- 4 Double-click a page in the document page area of the Pages panel.

The elements added to the master page or spread appear on the document page.

Did You Know?

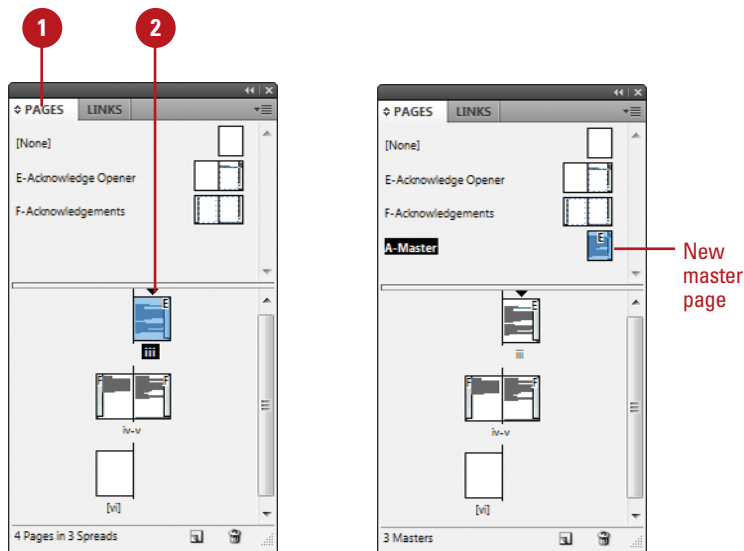
You can load master pages from another document. Select the Pages panel, click the Options menu, click Load Master Pages, select the file, and then click Open.

A master page holds and displays all the elements that you want to appear on every page in a document, such as headers, logos, page numbers, and footers. The master is like a background layer to a page. Everything on the background layer appears on the page above it. Master elements appear on document pages surrounded by a dotted border to make them easy to identify. When you create a new document, you also create a master page. If you want to create additional master pages, you can create them from scratch or from an existing page or spread.



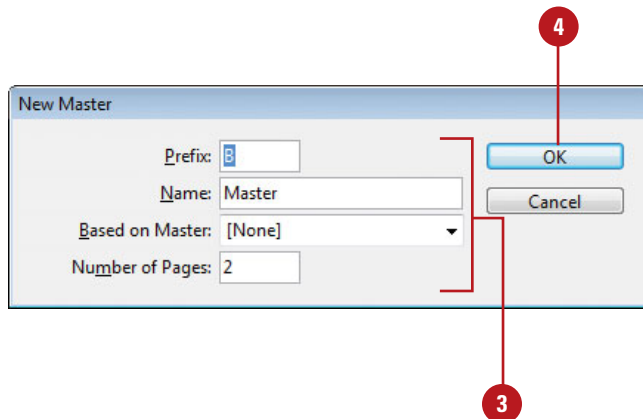
Create a Master Page from an Existing Page

- 1 Select the **Pages** panel.
 - ◆ You can also click the **Window** menu, and then click **Pages**.
- 2 Drag a page or a spread from the document page area to the master page area.
 - ◆ You can also select a page or spread, click the **Options** menu, and then click **Save As Master**.



Create a Master Page from Scratch

- 1 Select the **Pages** panel.
 - ◆ You can also click the **Window** menu, and then click **Pages**.
- 2 Click the **Options** menu on the panel, and then click **New Master**.
- 3 Select from the following Pages panel options:
 - ◆ **Prefix**. Enter a prefix up to four characters. This identifies the applied master for each page.
 - ◆ **Name**. Enter a name for the master page.
 - ◆ **Based on Master**. Select an existing master on which to base the new master.
 - ◆ **Number of Pages**. Enter the number of pages (1-10) you want in the master spread.
- 4 Click **OK**.



Working with Master Pages



ID 1.1, 2.11, 6.4

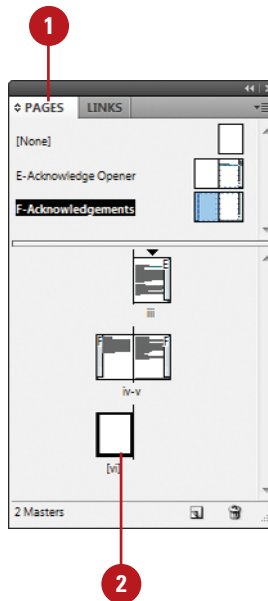
Apply a Master Page to a Document Page

- 1 Select the **Pages** panel.
 - ◆ You can also click the **Window** menu, and then click **Pages**.
- 2 Drag a master page or spread from the master page area to a page or spread in the document page area.
- 3 To apply a master to multiple pages, select the pages in the document page area, and then Alt (Win) or Option (Mac) the master page you want to apply.
 - ◆ You can also click the **Options** menu, click **Apply Master To Pages**, specify the options you want, and then click **OK**.

Did You Know?

You can change master page options. Select the Pages panel, select the master page, click the Options menu, click Master Options for *master page name*, specify the options you want, and then click OK.

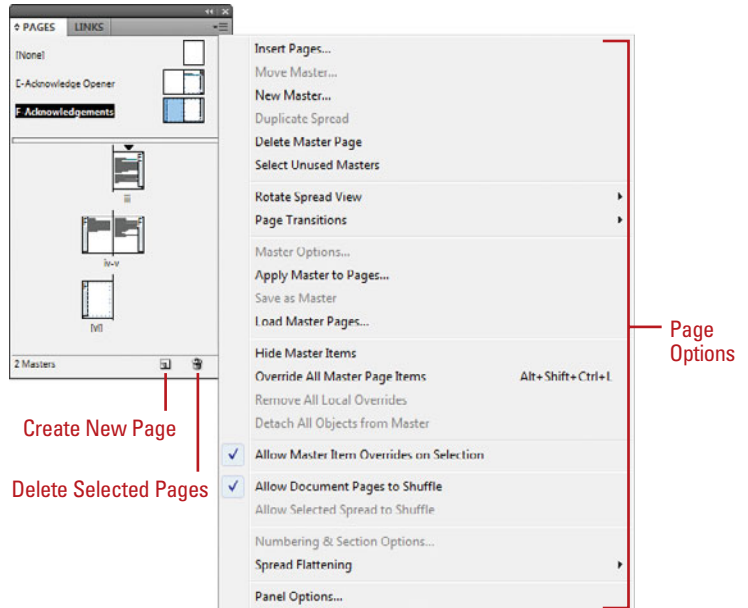
When you apply a master page to a document page, all the elements on the master page are attached and displayed on the document page. When you only want a selected number of elements from the master page on a document page, you can override or detach the elements you want. Overriding a master puts a copy of the master element on the document page and keeps the link, where you can make changes to it. The changes made on the document page don't affect the master; however, any changes to the same element on the master (separate from the document page) still appear from the master on the document page. Detaching a master overrides a master element and removes the link. Instead of overriding or detaching master elements, you have the option of hiding them



Work with Master Pages

- ◆ **Delete Masters.** In the Pages panel, drag a master page you want to delete to the **Delete Selected Pages** button on the panel.
- ◆ **Copy Masters.** In the Pages panel, drag a master page you want to copy to the **Create New Page** button on the panel.
- ◆ **Hide Master Elements.** In the Pages panel, select the document page, click the **Options** menu, and then click **Hide Master Items**.
- ◆ **Override a Master Element.** In the Pages panel, click the **Options** menu, and then click **Allow Master Item Overrides On Selection** to select it. On a document page, Ctrl+Shift+click (Win) or ⌘+Shift+click (Mac) an element.
 - ◆ You can also click the document page in the Pages panel, click the **Options** menu, and then click **Override All Master Page Items**.
- ◆ **Detach a Master Element.** On a document page, Ctrl+Shift+click (Win) or ⌘+Shift+click (Mac) an element to override it (see above). In the Pages panel, click the **Options** menu, and then click **Detach Selection From Master**.
 - ◆ You can also click the **Options** menu, and then click **Detach All Objects From Master**.
- ◆ **Unassign Master.** In the Pages panel, drag the **[None]** master from the master page area to a page in the document page area.

All master elements are no longer attached to the document page.



Working with Page Numbers and Sections



ID 2.1, 2.11

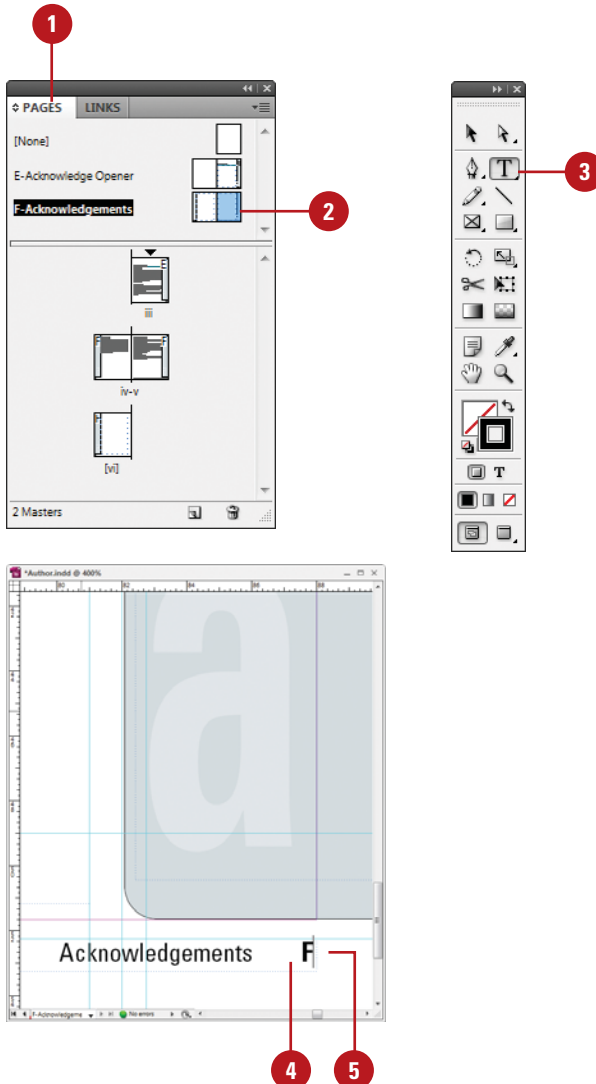
Add a Page or Section Number to a Page Master

- 1 Select the **Pages** panel.
 - ◆ You can also click the **Window** menu, and then click **Pages**.
- 2 Double-click the master page in the master page area of the Pages panel.

The master page or two page spread appears in the document window.
- 3 Select the **Type** tool on the Tools panel.
- 4 Click where you want to create a text box for the page or section number.
- 5 Click the **Type** menu, point to **Insert Special Character**, point to **Markers**, and then click **Current Page Number** or **Section Marker**.

A special character marker appears in the text box. The current page or section number is the prefix for the master page.
- 6 For facing pages, repeat steps 3-5 for the other page.

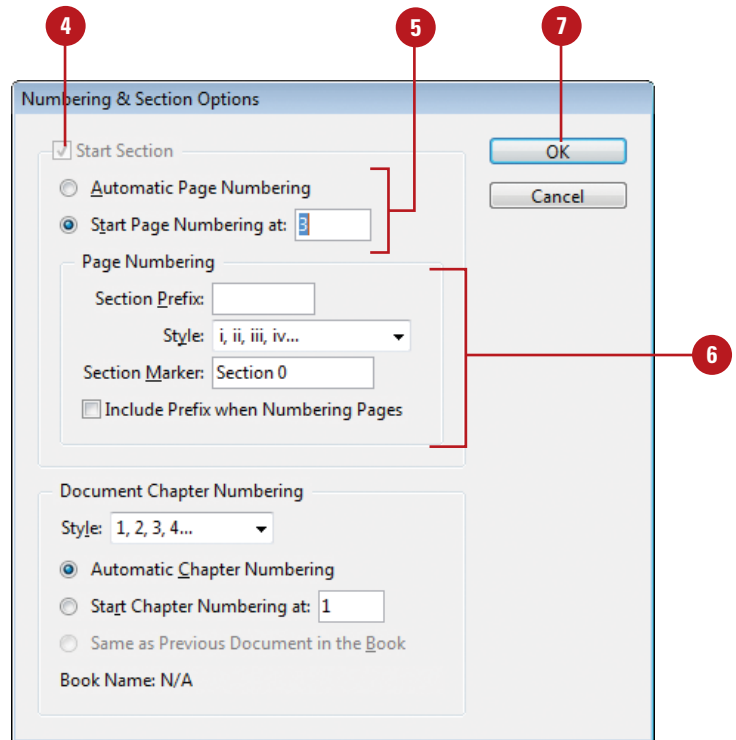
One of the most common elements added to a master page is a page number. InDesign uses a special character to designate page numbers. On a master page, simply create a text box, place the insertion point in the box, and then insert the current page number marker. You can also insert and format additional text and variables in the text box to create a header or footer across the top or bottom of the page. You can also use the Numbering & Section Options dialog box to change the format of page numbers or the starting page number. If you want to insert text before the page number, you can specify a section prefix. In addition to page numbers, you can also define a section within a document with separate numbering. A section indicator icon (black triangle) appears above the page thumbnail in the Pages panel.



Set Page Numbering and Section Options

- 1 Select the **Pages** panel.
- 2 Double-click the page where you want to start the page numbering or section to start.
- 3 Click the **Layout** menu, and then click **Numbering & Section Options**.
- 4 Select the **Start Section** check box to start a new section.
- 5 Click the **Automatic Page Numbering** or **Start Page Numbering At** option.
- 6 If you selected the **Start Page Numbering At** option, specify the following options:
 - ◆ **Section Prefix.** Enter a prefix that will appear before the page number, if desired.
 - ◆ **Style.** Select a style for the page number.
 - ◆ **Section Marker.** Enter text, such as *Section*, for a section within a document.
 - ◆ **Include Prefix When Numbering Pages.** Select this option if you want to add the section prefix to the page number.
- 7 Click **OK**.

A section indicator icon (black triangle) appears above the page thumbnail in the Pages panel.
- 8 Double-click the page where you want the section to end, and then repeat steps 3-7 for section numbering (except, in this case, you will need to deselect the **Start Section** check box).



Working with Chapter Numbers

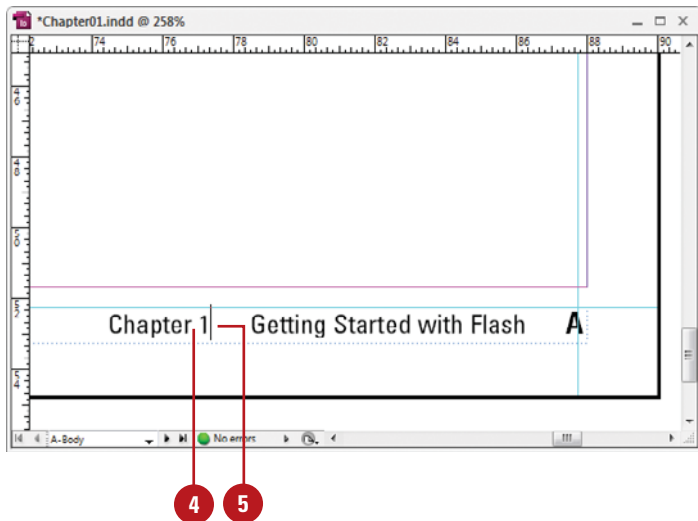
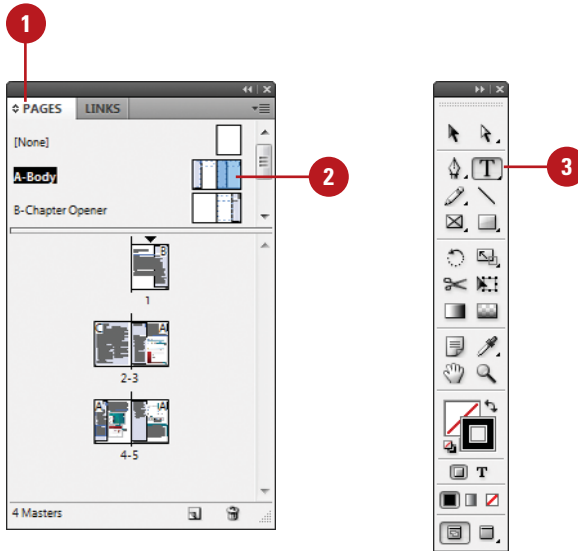


ID 6.5

Add a Chapter Number to a Document

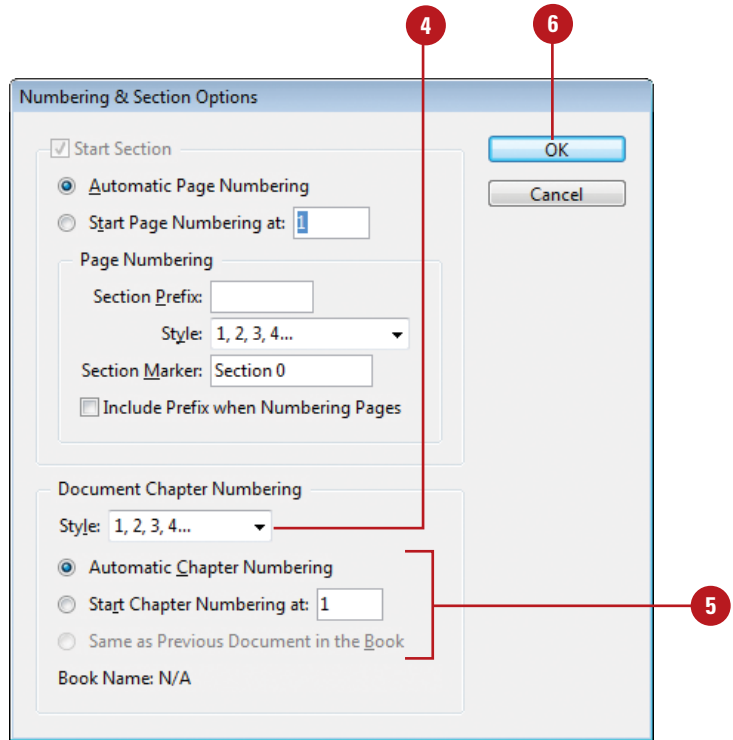
- 1 Select the **Pages** panel.
 - ◆ You can also click the **Window** menu, and then click **Pages**.
- 2 Double-click the page or master page where you want to place a chapter number.
- 3 Select the **Type** tool on the Tools panel.
- 4 Click where you want to create a text box for the chapter number.
- 5 Click the **Type** menu, point to **Text Variables**, point to **Insert Variable**, and then click **Chapter Number**.

Like page numbers, you can insert chapter numbers into documents that will be part of a book. Unlike a page number, a chapter number is a predefined text variable. The chapter number variable can be updated automatically and formatted as text. To insert a chapter number variable, create a text box, place the insertion point in the box, and then insert the variable using the Text Variable submenu on the Type menu. You can use the Numbering & Section Options dialog box to change updating options for chapter numbers.



Set Chapter Numbering Options

- 1 Select the **Pages** panel.
- 2 Double-click the page where you want to start the chapter numbering.
- 3 Click the **Layout** menu, and then click **Numbering & Section Options**.
- 4 Click the **Style** list arrow, and then select a chapter numbering style.
- 5 Select one of the following options:
 - ◆ **Automatic Chapter Numbering.**
 - ◆ **Start Chapter Numbering At.** Enter a starting chapter number.
 - ◆ **Same as Previous Document in the Book.**
- 6 Click **OK**.



Creating and Using Text Variables



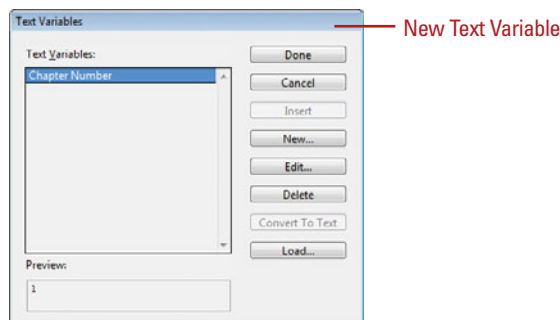
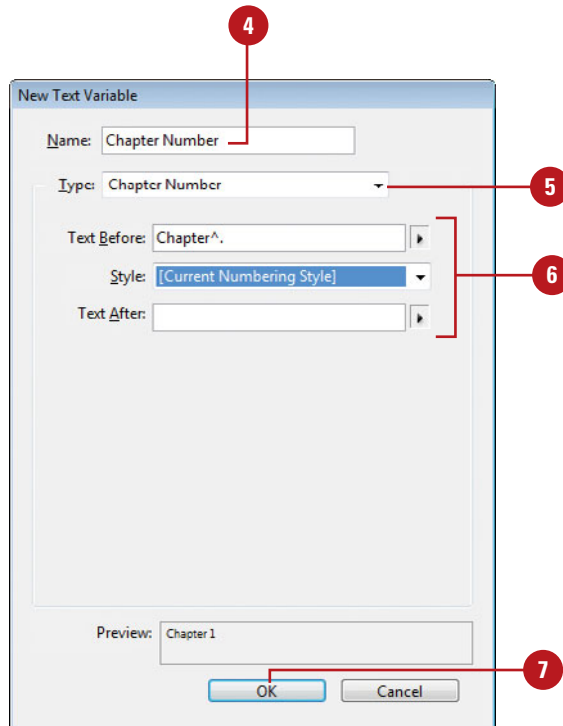
ID 2.11, 6.2, 6.5

Define a Text Variable

- 1 To define text variables for all documents, close all open documents. Otherwise, the text variable is only available for the current document.
- 2 Click the **Type** menu, point to **Text Variables**, and then click **Define**.
- 3 Click **New**, or select an existing variable, and then click **Edit**.
- 4 Type a name for the variable.
- 5 Click the **Type** list arrow, and then select a variable type.
- 6 Specify the options you want for the selected variable type.

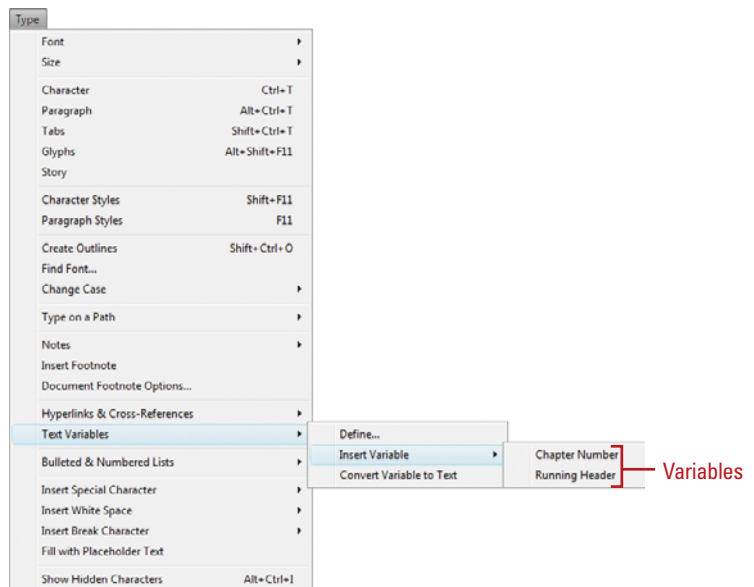
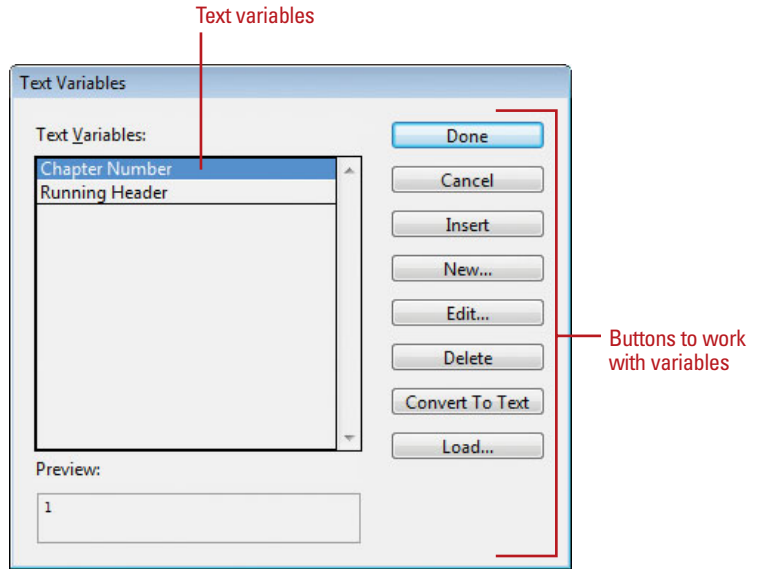
Options vary; some of the common options include:
 - ◆ **Text Before or Text After.** Insert text to add before or after the text variable.
 - ◆ **Style.** Select a style for the selected variable type.
- 7 Click **OK**.

A text variable is an element that varies based on circumstances in the document. You can use one of the preset text variables that comes with InDesign or you can create your own. Some of the preset variables include Running Header and Chapter Number. These are useful for adding information to master pages. Other variables, such as Creation Date, Modification Date, Output Date, and File Name, are useful for adding file information to the slug area for printing. To use a text variable, simply create a text box, place the insertion point in the box, and then insert the variable using the Text Variable submenu on the Type menu. You can also insert and format additional text along with the Running Header variable in the text box to create a header or footer across the top or bottom of the page on a document or master page.



Work with Text Variables

- ◆ **Insert Text Variables.** Click to place the insertion point where you want the text variable (on a document or master page), click the **Type** menu, point to **Text Variables**, point to **Insert Variable**, and then select a variable.
- ◆ **Delete Text Variables.** Click the **Type** menu, point to **Text Variables**, click **Define**, select the variable, and then click **Delete**.
- ◆ **Convert Text Variables to Text.** Select the text variable in the document, click the **Type** menu, point to **Text Variables**, and then click **Convert Variable to Text**.
- ◆ To convert all instances of the text variable, click the **Type** menu, point to **Text Variables**, click **Define**, select the variable, and then click **Convert To Text**.
- ◆ **Import Text Variables from Another Document.** Click the **Type** menu, point to **Text Variables**, click **Define**, click **Load**, double-click the document with the variables, select the variables that you want in the Load Text Variables dialog box, and then click **OK**.



Creating a Book



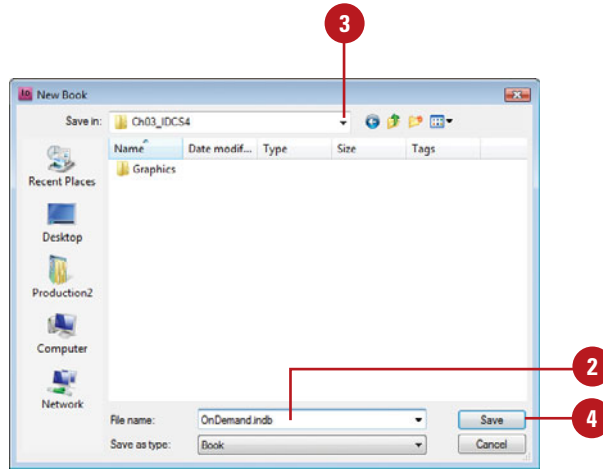
ID 6.2

Create a New Book

- 1 Click the **File** menu, point to **New**, and then click **Book**.
- 2 Enter a name for the book file.
- 3 Navigate to the drive or folder location where you want to save the book.
- 4 Click **Save**.

The tab for the Book panel displays the name of the book.

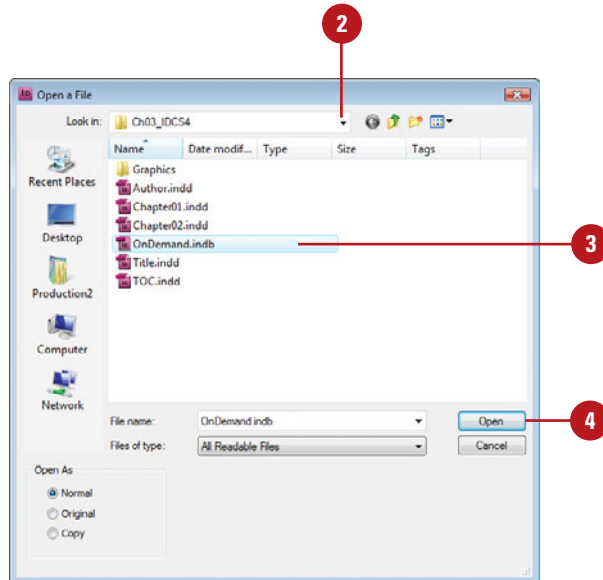
Instead of creating long InDesign documents, you can break them up into smaller documents, like chapters, and then create a book to bring them all together. A book is not a document. It simply keeps track of all the documents in the book and coordinates document page numbers, colors, and styles. When you create a new book or open an existing book, the Book panel appears, displaying the book name in the title tab. In the Book panel, you can add, remove, move, or open documents.



Open an Existing Book

- 1 Click the **File** menu, and then click **Open**.
- 2 Navigate to the drive or folder location where the book you want to open is stored.
- 3 Select the book you want to open.
- 4 Click **Open**.

The Book panel opens.



Add, Remove, Move, or Open Documents in a Book

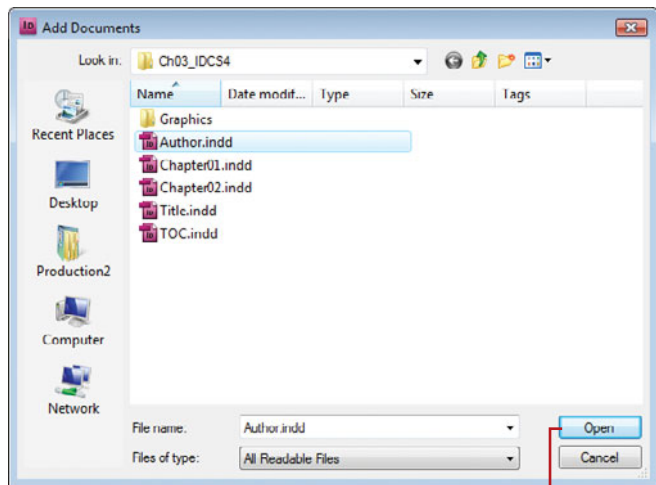
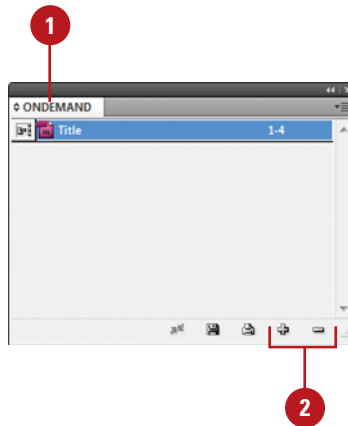
- 1 Open the book you want to edit.
- 2 Do any of the following:
 - ◆ **Add a Document.** Click the **Add Document** button on the panel, locate the document you want to add, and then click **Open**.
 - ◆ **Remove a Document.** Select a document in the Book panel, and then click the **Remove Document** button at the bottom of the panel.
 - ◆ **Move a Document.** Drag a document to a new position in the Book panel.
 - ◆ **Open a Document.** Double-click a document in the Book panel. An open book icon appears, indicating the book is open.
- 3 Click the **Save Book** button on the panel.
- 4 Click the **Close** button to close the book.

Did You Know?

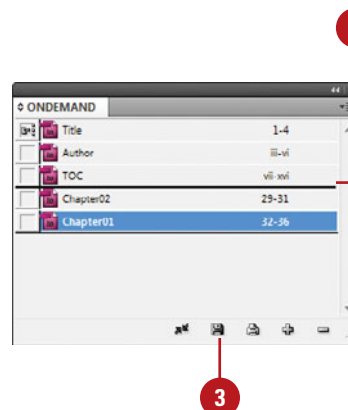
You can replace a document in a book.

Open the book, select the document that you want to replace, click the Options menu, click Replace Document, select the replacement file, and then click Open.

You can print an entire book. Open the book, and then click the Print Book button on the panel.



Open a document



Move a document

Managing Books



ID 6.2

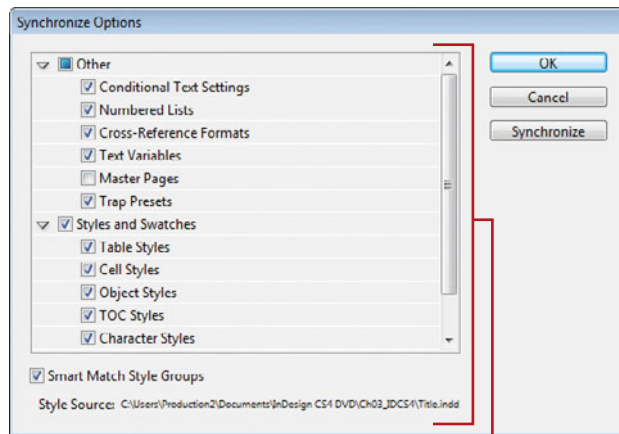
Synchronize Books

- ◆ **Synchronize Options.** Open the book, click the **Options** menu, click **Synchronize Options**, select the options you want to synchronize, and then click **OK**.
- ◆ **Set Style Source.** Open the book, and then click the **Style Source** box next to the name of the document.
- ◆ **Synchronize Style Source for a Book.** Open the book, click the **Synchronize Book** button on the panel.
- ◆ **Synchronize Style Source for a Document.** Open the book, select the document, click the **Options** menu, and then click **Synchronize Selected Documents**.

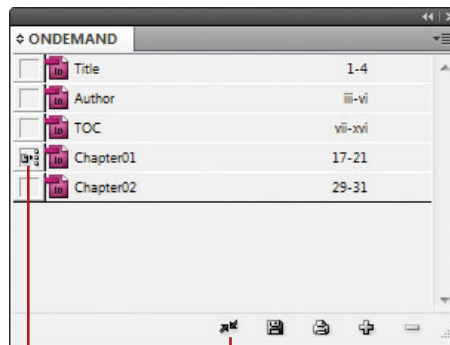
Did You Know?

You can set page numbers for each document in a book. Open the book, click the Options menu, click Document Numbering Options, specify the options you want, and then click OK. See “Working with Page Numbers,” on page 71 for details about the page numbering options.

When you create a book, you can synchronize page numbers, colors, and styles for all the documents in the book. Each book uses a file called the *style source* to control the style sheets (including character, paragraph, table, and object styles), swatches, conditional text, numbered lists, text variables, and master pages for all the documents in the book. When you make changes to the style source file, all or selected documents in the book are synchronized to the file. You can set synchronizing options to specify the features that you want to keep up-to-date in the Synchronize Options dialog box. With the Smart Match Style Groups synchronize option, you can synchronize a book without creating duplicate styles (**New!**).



Synchronize options

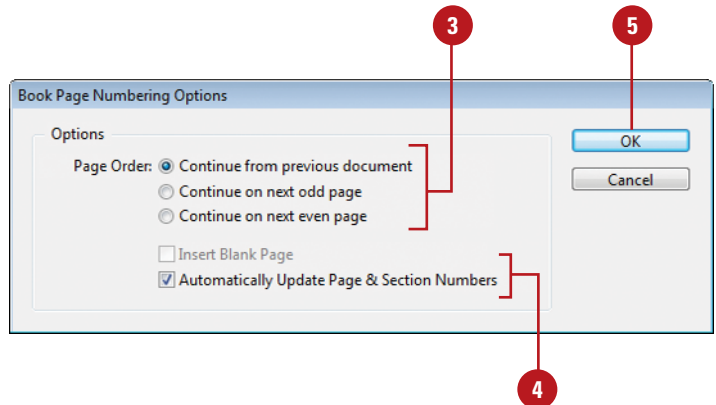
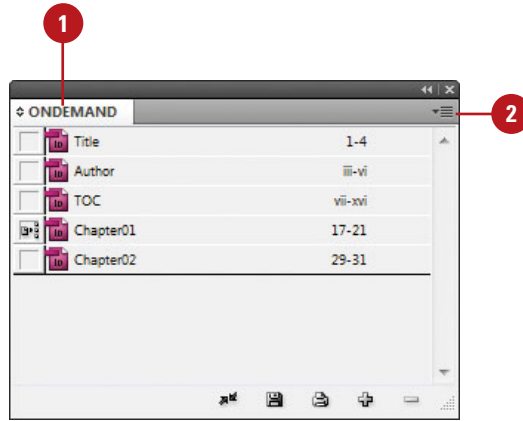


Style source

Click to synchronize styles and swatches with the Style Source

Set Page Numbering Options in a Book

- 1 Open the book you want to change.
- 2 Click the **Options** menu, and then click **Book Page Numbering Options**.
- 3 Select one of the following Page Order options:
 - ◆ **Continue from previous document.** Starts new pages in sequence.
 - ◆ **Continue on next odd page.** Starts new pages on an odd number.
 - ◆ **Continue on next even page.** Starts new pages on an even number.
- 4 Select any of the following options:
 - ◆ **Insert Blank Page.** Select to insert a blank page when using odd or even page numbers.
 - ◆ **Automatically Update Page & Section Numbers.** Select to automatically adjust page numbers in book documents.
- 5 Click **OK**.
- 6 To update numbering in a book, click the **Options** menu, choose **Update Numbering**, and then click any of the following:
 - ◆ **Update Page & Section Numbers.**
 - ◆ **Update Chapter & Paragraph Numbers.**
 - ◆ **Update All Numbers.**



Creating a Table of Contents

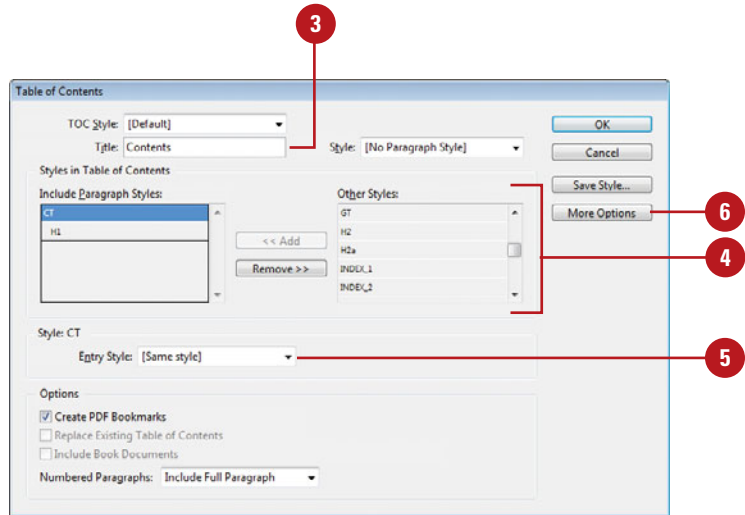


ID 6.3, 7.3

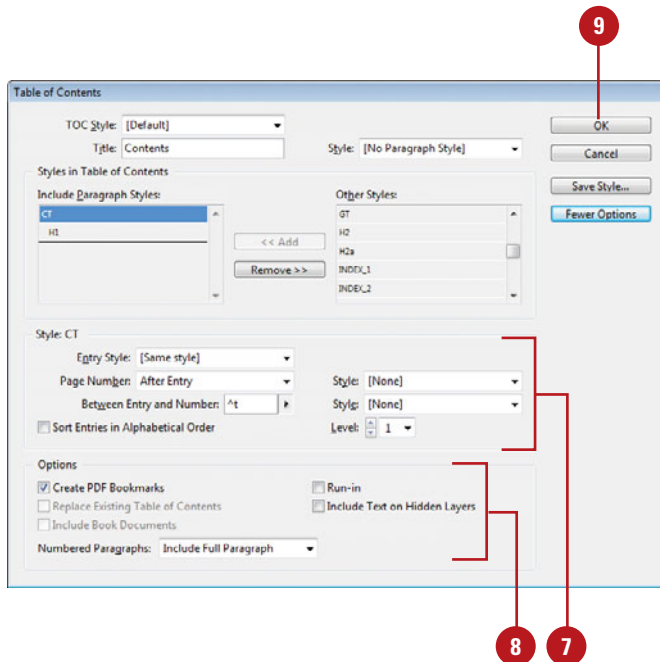
Prepare for and Create a Table of Contents

- 1 To prepare for creating a table of contents, do the following:
 - ◆ **Add Page for TOC.** Add a page for the table of contents.
 - ◆ **Add Paragraph Styles.** Apply different paragraph styles to the text that you want to use in the table of contents.
- 2 Click the **Layout** menu, and then click **Table of Contents**.
- 3 Enter text for the title of the table of contents, and then use the Styles menu to select a style for the title text.
- 4 Select the paragraph styles that are applied to text in your document (under Other Styles), and then click **Add** to include them in the other list (under Include Paragraph Styles).
 - ◆ To remove a style, select it (under Include Paragraph Styles), and then click **Remove**.
- 5 To format an entry in the table of contents, select the entry (under Include Paragraph Styles), click the **Entry Style** list arrow, and then select a style.

A table of contents (TOC) appears at the beginning of a document, typically a long one, with page numbers associated with the beginning of main sections of the document. InDesign creates a table of contents based on the styles applied to paragraphs in the document. The table of content displays the text and page number associated with the paragraph styles. For example, when you apply different styles for chapter and topic titles in this book, you create a table of contents based on chapters and topics. So, before you can create a table of contents, you need to apply paragraph styles to text in your document.



- 6 Click **More Options** to display additional options.
- 7 Select any of the following advanced options:
 - ◆ **Page Number.** Select a position for the entry's page number.
 - ◆ **Between Entry and Number.** Select a separator character between the entry and the number.
 - ◆ **Sort Entries in Alphabetical Order.** Select to alphabetize the table of contents.
 - ◆ **Level.** Select an indent level for each entry in the table of contents.
- 8 Select any of the following options:
 - ◆ **Create PDF Bookmarks.** Select to add bookmarks to the PDF created from the table of contents.
 - ◆ **Replace Existing Table of Contents.** Select to update or change the table of contents.
 - ◆ **Include Book Documents.** Select to create a table of contents of all the documents in a book.
 - ◆ **Numbered Paragraphs.** Select to format how paragraphs with auto numbering are formatted.
 - ◆ **Run-In.** Select to create a single paragraph table of contents with each entry separated by a semicolon (;) and a space.
 - ◆ **Include Text on Hidden Layers.** Select to use hidden text on layers.
- 9 Click **OK**.



Adjusting Layouts

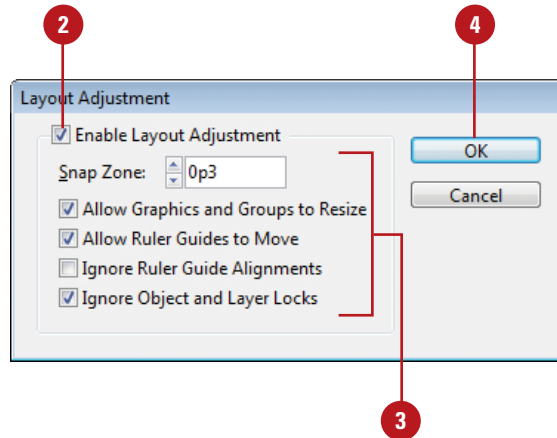
Change Layout Adjustment Options

- 1 Click the **Layout** menu, and then click **Layout Adjustment**.
- 2 Select the **Enable Layout Adjustment** check box.
- 3 Select from the following options:
 - ◆ **Snap Zone.** Enter a distance value for snapping an object to a margin, column guide, or page boundary.
 - ◆ **Allow Graphics and Groups to Resize.** Select to allow graphics and groups to resize during the adjustment.
 - ◆ **Allow Ruler Guides to Move.** Select to allow ruler guides to move during the adjustment.
 - ◆ **Ignore Ruler Guide Alignments.** Select to keep objects from moving along ruler guides during the adjustment.
 - ◆ **Ignore Object and Layer Locks.** Select to move locked objects and layers during the adjustment.
- 4 Click **OK**.

See Also

See "Setting Up a Document" on pages 34-35 for more information on changing the document page size and margins.

If you ever need to change the page size or margins after you have already added a document page or created a master page, you can enable the Layout Adjustment option to have InDesign adjust the layout and position of elements on document and master pages. The Layout Adjustment dialog box allows you to enable the option and set other related adjustment options, such as Allow Graphics and Groups to Resize and Ignore Object and Layer Locks.



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