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Shakoor Bukhuth

CLASSROOM IN A BOOK[®]

The official training workbook from Adobe

Kelly Kordes Anton and John Cruise

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Lesson 1: Introducing the Workspace

This lesson provides an overview of the InDesign work area. By the end of the lesson, students should understand the overall interface of InDesign, including how to select tools, manage panels and windows, navigate pages, and change a document's magnification.

Missing fonts

Page 8: When you open the sample document for this chapter—and all other chapters—the Missing Fonts dialog box may display based on the fonts available on the system. All the lessons fonts are available for free from the Adobe Typekit online service. Clicking Sync Fonts will automatically download and install the necessary fonts, providing the computer is connected to the Internet. In a training center environment, you may want to leave the fonts installed. The users will still learn to use the Missing Fonts dialog box in Chapter 6.

Tools panel

Pages 11–13: Many of the tools have popup options—so tools you need to access may be hidden beneath other tools. The tool tip for each tool displays its name and single-letter shortcut. In addition, the Tools panel can be configured in various ways, including horizontal.

Application bar and Control panel

Pages 13–14: The Application bar displays across the top of the screen by default, but can be hidden to save screen space (Mac OS only). The Control panel also displays across the top of the screen; most users keep it open, but you may wish to move it to the bottom of the screen.

New window

Pages 16–17: InDesign lets you open a single document in multiple windows so you can compare different views. It is important to note that new windows are not the same as new documents.

Panels

Pages 17–21: With the proliferation of panels in InDesign, it's important to keep the workspace neat and organized. Encourage students to learn to open, close, dock, float, collapse, expand, and group panels to meet specific needs. Students do not need to master the entire gamut of panel management techniques—they simply need to decide on favorites based on their screen size, projects, and work style.

Panel menus

Page 21: Make sure students know that panels have menus that provide additional features and panel-customization options. Many features you need for formatting paragraphs, for example, are available in the Paragraph panel menu.

Workspaces

Page 22: InDesign provides a variety of default workspaces, which are panel configurations for specific purposes such as preparing for output or fine-tuning typography. Users can save their own panel configurations as workspaces as well.

Zooming

Pages 23–25: While the Zoom tool works well, you can work more efficiently by holding down the modifier keys to temporarily activate the Zoom tools. Use Ctrl+Spacebar (Windows) or Command+Spacebar (Mac OS) to temporarily activate the Zoom tool, which allows you to quickly increase your magnification without having to switch tools. To zoom out, press Ctrl+Alt+Spacebar (Windows) or Command+Option+Spacebar (Mac OS). You can find other zoom controls in the View menu and on the Application bar.

Navigating and scrolling

Pages 25–26: InDesign lets you “turn pages,” jump to a specific page, scroll through documents, and use the Hand tool to “push” pages around. Rather than selecting the Hand tool on the Tools panel, you can temporarily select it as follows:

- Press the space bar when the Type tool is not selected.
- Press the Alt (Windows) or Option key (Mac OS) when the Type tool is selected.
- Press Alt+Spacebar (Windows) or Option+Spacebar (Mac OS) at any time.

Context menus

Page 27: Context menus are widely used throughout InDesign—for example, you can modify an object’s stroke weight from a context menu or start a spell check within text. To display context menus, right+click (Windows) or Control+click (Mac OS) on objects, within text, on pages, and more. These helpful menus provide quick access to frequently used features. (Note that you may be able to configure the mouses in your training centers to right+click, even if you have Macs.)

Questions

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

Answers

- 1 Panel configurations are saved as workspaces (Window > Workspace > New Workspace).
- 2 Some tools are hidden in popouts of other tools. You must click and hold down on a tool to select any tools in its popout.

Lesson 2: Getting to Know InDesign

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

Adobe Bridge window

Pages 32–33: Many Adobe Creative Suite workflows depend on Adobe Bridge for organizing files. Point out how much more information is available about a file when opening it through Bridge, including Metadata and Previews.

Viewing layout aids

Pages 33–34: Explain that layout aids such as guides and hidden characters are crucial to fine-tuning a layout. Since users show and hide them so often, it’s worth memorizing the keyboard shortcuts for your favorite layout aids.

Preflight panel

Pages 34–36: While students are not ready to start printing or exporting documents, the Preflight panel is introduced to show that all design decisions—even in the early stages—should be made while considering the final output format. Students should get in the habit of keeping an eye on the Preflight panel to prevent common errors such as missing fonts, incorrect color usage, overset text, and more.

Text and threading

Pages 37–38: Point out that students use the Type tool for creating text frames, typing text, and editing text. Any tool can be selected for importing text. The Selection tool or Direct Selection allow users to thread text frames.

Styles

Pages 39–42, 47: Styles are introduced here to get users in the habit of working with basic styles even on simple documents. For example, most documents will have paragraph styles for Head 1, Head 2, and Body Text. InDesign also offers object styles to ensure consistent formatting of objects such as sidebar boxes and pull-quote frames. Creating and applying styles will significantly streamline text and object formatting for the remainder of the document.

Graphics

Pages 42–44: Importing, placing, repositioning, and cropping are key elements of working with graphics.

Objects

Pages 45–47: Objects are the building blocks of pages, so it's important that users know how to move them, change their formatting, and wrap text around them.

Questions

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

Answers

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

Lesson 3: Setting Up a Document and Working with Pages

This lesson provides the foundation for creating new documents. It explains how to create new documents with custom page sizes, set up a master page, apply a master page to document pages, create independently numbered sections, add and arrange document pages, change the size of pages, and rotate a document page. Students also do a bit of page layout at the toward the end of the lesson.

Saving custom document settings

Pages 55–56: You are not required to create a document preset before creating a new document. You should create document presets only if you will be frequently reusing custom page settings, such as page size and margins.

Using a document preset

Pages 56–57: After defining a document preset to start the lesson, the next step is using it as the starting point for a new document. Using a preset saves time and ensures that all of the settings in the New Document dialog box are correct.

Master pages

Pages 58–67: An understanding of master pages is critical for anyone who will be creating multipage documents. Master pages help ensure design consistency and streamline the task of page layout in long documents.

Guides

Pages 56–59: You can place row and column guides, as well as ruler guides, on document pages and master pages. Notice that when a guide is placed on a master page, it is not editable (you cannot select it) on document pages based on the master page. Students may either need to break the master link to a guide or reposition it on its master page.

Text frames and placeholder frames for text and graphics

Pages 59–63: It is not necessary to create placeholder frames before importing text or graphics. While this lesson uses a foundation of placeholder frames on master pages to create a consistent layout, you can also create frames on document pages “on the fly” when you import text and graphics.

Applying master pages

Pages 66–67: The Pages panel is an invaluable tool for working with the pages in a multipage document. It displays thumbnails of master pages and document pages and lets you assign a master page to each document page. The Pages panel is also a useful navigation tool. Double-clicking a thumbnail displays that page in the document window.

Adding document pages

Page 68: An alternative to using the Insert Pages command in the Pages panel menu, you can drag master page icons from the top of the Pages panel to the bottom of the panel to add pages to a document. Students can also choose Layout > Pages > Insert Pages as another alternative.

Rearranging and deleting pages

Page 68: As an alternative to dragging thumbnails in the Pages panel, choosing Layout > Pages displays a menu with several commands for working with the pages and spreads in a multipage publication, including Add Page, Insert Pages, Move Pages, Duplicate, and Delete.

Changing the size of pages

Page 69: A document can contain as many different-sized pages as you want. For example, you can create a single document that contains all of the various-sized publications that make up a corporate identify—a business card, a letterhead, an envelope, and so on. Or you could add a double-wide foldout page or a smaller-sized insert to a magazine.

Adding sections

Pages 70–71: Many documents, especially long documents with front matter, don't start with page number 1 but instead begin on a page that uses a different numbering system—for example, uppercase or lowercase Roman numerals. The ability to specify independently numbered sections and choose among several numbering styles allows you to create custom numbering schemes within long documents.

Placing text and graphics on document pages

Pages 72–74: The distinction between master pages and document pages in the Pages panel is a key concept for novice InDesign users. To emphasize the difference between master pages and document pages, make sure to point out the area in the Pages panel that contains the document's master pages and distinguish these pages from the document pages below. Navigate several times between master pages and document pages to clarify the concept for students.

Overriding master items

Pages 72–74: If you want to detach all objects on the current page or spread from their master page rather than detach a single object, choose Detach All Objects From Master from the Pages panel menu.

Rotating spreads

Page 75: This feature is particularly useful for laying out landscape-oriented pages in documents with portrait-oriented page dimensions, and vice versa. When you print a document with rotated pages, InDesign will automatically adjust the orientation of the rotated pages so that they print correctly, which means that you don't have to unrotate pages before printing.

Questions

- 1 How can you avoid repetitive document-setup work if you often use the same settings for new documents?
- 2 When are master pages most useful?
- 3 What are some of the functions of the Pages panel?
- 4 How can you change the dimensions of some but not all document pages?

Answers

- 1 You can create a document preset or a template document. A document preset includes all of the settings in the New Document dialog box. A template document includes the settings in the New Document dialog box and can also

include additional elements, such as master pages, document pages, color swatches, and styles (paragraph, character, object, and so on).

- 2 Master pages are helpful for long documents with repetitive page formatting, such as running headers, running footers, or a consistent layout used on a number of pages.
- 3 The Pages panel displays thumbnails of a document's master pages and document pages. It includes controls and commands for adding and deleting master pages and document pages and for rearranging document pages. You can also use the Pages panel for navigation by double-clicking the page you want to display.
- 4 Use the Page tool to select the pages whose dimensions you want to change, and then modify the Width and Height values in the Control panel.

Lesson 4: Working with Objects

In this lesson students learn that building pages with InDesign primarily involves placing content (text and graphics) within containers (text frames and graphics frames) and modifying these two basic types of objects.

Working with layers

Pages 81–84: Layers are a key concept. These pages take students through the basics of layers and make them aware of the layer on which they are currently working. It's important for students to understand that layers are not appropriate for all documents. For example, simple documents with few objects may not benefit from having layers. Also, if a document is initially set up with layers, it's easy to forget about them later when design or production begins.

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

Using Smart Guides

Page 85: Smart Guides can be very helpful when creating, resizing, and positioning objects. However, when working on a page with numerous objects, Smart Guides can become cumbersome. The Smart Guide options in the Guides & Pasteboard section of the Preferences dialog box include four check boxes for specifying which Smart Guide features you want to use and which ones you want to turn off.

Text frames

Pages 86–92: Because most text elements are rectangular, the Type tool is the most appropriate tool for creating text frames. However, you can use any frame as a container for text. The Content command (File menu) lets you change the content of an empty frame. For example, you can change an empty text frame to a graphics frame by selecting the frame and choosing Object > Content > Graphic. An Unassigned frame has no content and is neither a text frame nor a graphics frame.

Fitting frames to their content

Page 87, step 7: If possible, allow students to practice in the pasteboard area with sample text and graphics frames by double-clicking different frame handles to see the results (especially with pictures). Point out the difference between double-clicking a corner handle (all four edges of the frame align with the edges of the graphic) and a midpoint handle (only the nearest edge and the opposite edge of the frame align with the edges of the graphic).

Changing the shape of a text frame: Selection tool vs. the Direct Selection tool

Pages 88–89: It is important to understand when to use the Selection tool and when to use the Direct Selection tool when working with frames. Use the Selection tool to change the dimensions of a frame; use the Direct Selection tool to change the shape of a frame by dragging anchor points. It's easy to forget which tool you are currently using. If you accidentally modify a frame using the wrong tool, choose Edit > Undo and then select the correct tool.

Graphics frames

Pages 92–100: In addition to placing graphics within frames created with the Rectangle Frame tool, the Ellipse Frame tool, and the Polygon Frame tool, you can also place graphics within frames created with the Rectangle tool, the Ellipse tool, and the Polygon tool. Warn students that while it's possible to place graphics within a text frame, the result is an anchored graphic, which behaves differently (like a character within text) than a graphic placed within a frame that's not a text frame.

Importing a graphic

Pages 94–96: If a frame is selected when you choose the Place command, the graphic you import is placed within the frame. If nothing is selected when you choose Place, clicking or clicking and dragging the loaded graphics icon will create a new graphics frame and place the graphic within it.

Cropping a graphic

Page 98: It's important for students to understand that a graphics frame and the graphic within can be selected and modified independently. To crop a graphic, you change the size of the graphics frame by dragging any of its resizing handles with the Selection tool. Cropping an image does not change the image itself (that is, the original graphics file is not affected by cropping within InDesign). The visible area is all that changes when you resize a graphics frame.

Importing multiple graphics into a grid of frames

Pages 95–96: If you want to place multiple pictures on a page, you can import them simultaneously by selecting them in the Place dialog box (or by dragging them from Windows Explorer or Mac Desktop) and then either clicking and dragging to create a frame for each graphic, or you can create a grid of identically sized and equally spaced graphics frames by pressing the arrow keys as you drag the loaded graphic icon.

Scaling and moving graphics

Pages 96–97: The ability to select both a graphics frame or the graphic within a graphics frame with the same tool (the Selection tool) greatly reduces the need to switch tools when working with graphics and graphics frames. Make sure that the student understands that clicking within the content grabber doughnut when the hand pointer is displayed and then dragging moves the graphic, while clicking outside the content indicator doughnut when the arrow pointer is displayed and then dragging moves the frame and the graphic.

Using the Gap tool

Pages 98–99: The Gap tool lets you resize multiple objects with commonly aligned edges while keeping the gaps between them consistent. It's a powerful tool, but much of its versatility is the result of using modifier keys while dragging. If time allows, students can experiment with the different modifier keys: Shift, Ctrl+Shift, (Windows), Command-Shift, Alt (Windows) and Option (Mac OS).

Generating captions using metadata

Pages 99–100: Students should understand that the more tasks they can automate, the more time they'll have for being creative. The ability to automatically generate captions for graphics frames by extracting information stored in the original graphic file eliminates time-consuming manual labor. This feature can be invaluable for publications with a large number of graphics and captions.

Placing and linking graphics frames

Pages 101–104: Similar to the way you can create parent-child relationships between master pages, you can also create parent-child relationships between text frames and between graphics frames. If you make changes to the parent object, you have the option to update the child object.

Changing the shape of a frame

Page 106, step 7: This task is another example of the difference between the Selection tool and the Direct Selection tool. When students attempt to drag the upper-right corner of the frame, make sure that only the upper-right point is selected. This may require clicking off, then on, the upper-right corner point with the Direct Selection tool.

Text wrap

Pages 106–108: While this exercise has students wrap text around a polygon, you will most frequently use the second button in the Text Wrap panel (Wrap Around Bounding Box) to wrap around the bounding box of an object. If you apply a text wrap to an object, text within text frames that are either above or below the object is affected. If you want to wrap text only around objects that are in front of text frames, select Text Wrap Only Affects Text Beneath in the Composition section of the Preferences dialog box (Edit > Preferences > Composition on Windows; InDesign > Preferences > Composition on Mac OS). Text wraps are applied to text regardless of the layer on which objects are placed. You can prevent text in a frame from wrapping around an object to which you have applied a text wrap by selecting the text frame and then selecting Ignore Text Wrap in the Text Frame Options dialog box (Object > Text Frame Options).

Modifying object shapes using the Pathfinder panel

Page 109, step 4: This lesson covers only one of the five options in the Pathfinder Pathfinder menu; however, the other options are easy to use and make it easy to create complex shapes that would be difficult to draw with the Pen tools. If time allows, have students create some overlapping shapes on the pasteboard and then try some of the other Pathfinder options. Show them how two overlapping circles and the Subtract button can create a crescent moon and how three overlapping circles and the Add button can be used to create a snowman. Pathfinder options are also available in the Pathfinder panel (Window > Object & Layout > Pathfinder).

Creating polygons and converting shapes

Pages 109–110: The Polygon and Polygon Frame tools let you create equilateral polygons and starburst shapes that can be used as containers for text or graphics

or filled or stroked with color and used as graphic elements. After you create an object, you can change its shape by selecting it with the Direct Selection tool and then dragging any of the object's anchor points, or you can choose Object > Convert Shape and then choose any of nine basic shapes.

Adding corner effects to a frame

Page 111: In addition to manually changing the corners of the frame, you can also use the Corner Options dialog box (Object > Corner Options).

Rotating objects vs. rotating content

Pages 112–113: InDesign provides several options for rotating objects, including the option to click slightly outside the corner handle of a selected frame or graphic and drag in a clockwise or counterclockwise direction. You can also use the Rotation tool, the Rotation Angle field in the Control panel or Transform panel, or you can choose Object > Transform > Rotate. Although it's possible to rotate a graphic within a graphics frame by selecting the graphic and then using any of the aforementioned options, it's not possible to rotate the text within a text frame.

Aligning objects

Pages 114–115: While ruler guides and Smart Guides are helpful for aligning objects as you create them, the Align panel is helpful for aligning multiple objects that you've already created. The Align panel consists largely of buttons that indicate how the selected objects will align with each other if you click. If time allows, have students create a few sample objects on the pasteboard, select them, and then click the various buttons to see the results.

Scaling multiple objects

Page 116: Once you've selected objects you want to scale, the easiest way to scale them is to drag any of the corner handles of the bounding box that contains the objects. Hold down the Shift key when dragging to maintain the proportion of all objects. (Early versions of InDesign required you to group multiple objects before scaling them.)

Selecting and modifying an object within a group

Page 117: You can select an object that's part of a group by clicking it with the Direct Selection tool. Another method is to double-click an object within a group using the Selection tool. Once you've selected an object in a group by double-clicking it with the Selection tool, you can select any other object in the group (and not select the entire group) by clicking it.

Questions

- 1 What kinds of publications benefit from having multiple layers?
- 2 What is the difference between the Selection tool and the Direct Selection tool?
- 3 What's the easiest way to cause text to flow across three equal-sized, equal-spaced columns?
- 4 What tool is best for creating a placeholder frame for a graphic?
- 5 How do you cause text to flow around an object instead of through it?
- 6 What aids does InDesign offer for aligning objects?

Answers

- 1 Publications that have numerous objects benefit from having layers because you can organize different types of objects onto different layers. One simple implementation of layers is to create a layer named Text and another layer named Graphics. Place text objects on the Text layer; graphic objects on the Graphics layer. Once you've organized objects onto layers, you can use the Layers panel to show or hide and lock or unlock individual layers. InDesign also lets you show/hide, lock/unlock each object on a layer.
- 2 Use the Selection Tool to manipulate an entire frame or the graphic within a graphics frame. For example, use the Selection tool to move a frame (text or graphics) and its contents or to change the dimensions of a frame. You can also use the Selection tool to select and move a graphic within a graphics frame by clicking within the content grabber doughnut in the center of the frame and then dragging. Use the Direct Selection tool to select and move individual anchor points and line segments of a frame.
- 3 Use the Type tool to create a rectangular text frame, then choose Object > Text Frame Options. In the Text Frame Options dialog box, set the Number of Columns to 3. Text will automatically flow from the top of the first column to the bottom of the third column.
- 4 You can use either the Rectangle tool or the Rectangle Frame tool to create a frame for an imported graphic. The Rectangle tool creates an unassigned frame; the Rectangle Frame tool creates a graphics frame. You can import a graphic (by using either the Place command or by dragging and dropping a graphic file) into a frame created with either of these tools. The Rectangle Frame tool is often used to create placeholder frames for graphics because an empty frame created with this tool is displayed with an X through it to indicate there is no content.
- 5 By default, when an object overlaps a text frame, InDesign ignores the overlapping object and flows the text as though it weren't there. If you want the text to flow around the object rather than through it, you must apply a *text wrap*

to the object. The Text Wrap panel offers several controls for specifying how text flows when the selected object overlaps a text frame.

- 6 InDesign offers several options for aligning objects. When Smart Guides are enabled, InDesign snaps object centers and edges to the centers and edges of other objects on the page as you drag. You can also create horizontal or vertical ruler guides and use them to align edges when you create or reposition objects, and you can use the Align panel to align multiple objects and optionally apply an equal amount of space between them.

Lesson 5: Flowing Text

Because most InDesign documents include text written or editing in other programs, you should become familiar with the process of importing text and flowing it through the pages of a document. Remind students that if they misplace text or accidentally replace existing text when placing or threading, Edit > Undo will work wonders. Because InDesign provides so many text-flow methods, many of which require keyboard shortcuts, let students know to consult the “Threading text” section of the InDesign Help file for a refresher.

Flowing text into existing frames

Pages 127–129: When working with a template—the predesigned shell of a document—text frames often already exist. In this case, you can type or import text into these frames.

Flowing text manually

Pages 129–132: When working with text that continues across one or two pages, you might thread the text frames manually. Threading text frames requires the Selection tool. While threading frames, you can create new text frames as well.

Flowing text automatically

Pages 134–136: InDesign provides methods for automatically flowing text through threaded frames, even adding pages as necessary.

Resizing text frames automatically

Pages 135–136: Students can resize text frames manually at any time, but when a document is still being revised, this becomes inconvenient. The Auto-Size feature lets users create text frames that automatically resize as necessary (Object > Text Frame Options). This feature is especially useful for sidebar boxes.

“Continued on” lines

Pages 137–138: Students must follow the steps precisely to successfully create “continued on” lines, also known as jump lines. Make sure no text wrap is applied to any objects that the jump line text frame is near. Also, make sure that the two text frames fully touch to get the Next Page Number to work.

Questions

- 1 How do you load the Type tool with text files to import?
- 2 Which tools let you thread text frames?

Answers

- 1 To load the Type tool with text files to import, choose File > Place. You can select multiple files to import.
- 2 The Selection tool and the Direct Selection tool let you thread text frames.

Lesson 6: Editing Text

In most publishing workflows, text is created using a word-processing program and then imported into InDesign. This text is rarely 100 percent final, however—most InDesign users will need to enter revisions to text that is already flowed into documents. In addition, some users will wear multiple hats—such as writer and layout artist—and use InDesign as their primary word processor.

Missing fonts

Pages 142–144: To make sure that students experience the Missing Fonts alert, be sure that Corbel Bold is not active on their systems. Explain to students that while fonts do come with some programs, they are actually separate files that may be activated (on) or deactivated (off) on their systems. Most fonts are purchased for a single user or workgroup according to a license agreement—therefore, they should not be shared at random.

To resolve a missing font, users can locate and activate the font or replace the font with a different font. Note that replacing a font can have a negative impact on the design. InDesign indicates missing fonts as follows:

- Missing fonts are listed in an alert when you open a document.
- The Font menu in the Character panel lists missing fonts in brackets.
- Missing fonts are highlighted in pink in the layout (except in Preview mode). You can turn this off in the Composition panel of the Preferences dialog box.

Find/Change

Pages 146–149: The InDesign Find/Change options range from simple word searches to finding sophisticated patterns and changing the text or formatting. Since the Find/Change capabilities can be overwhelming, point out to students that they can click Fewer Options when performing simple text searches. If it seems like Find/Change is not working, check the state of all the buttons (such as Case Sensitive) and make sure nothing extra is specified in the Find Format area.

Checking spelling

Pages 149–154: InDesign provides many features for checking spelling, including highlighting possible misspelled words, automatically correcting spelling as you type, and customizing the spelling dictionary. This is a good time to remind students that the final word on spelling needs to come from a human, preferably an editor, as InDesign cannot understand context.

Using the Story Editor and tracking changes

Pages 155–157: The Story Editor isolates text in a separate window, making it easier to edit text that is placed on complicated backgrounds, revise long blocks of text, and make text fit. While revising text in InDesign, it may be important to keep track of what changes were made. In that case, you can track changes in the Story Editor.

Questions

- 1 How can you spell check all the text in a document?
- 2 What is the advantage of using Find/Change to search and replace formatting?

Answers

- 1 You can choose the Document option in the Check Spelling dialog box (Edit > Spelling).
- 2 Find/Change ensures consistent formatting by finding all instances of the specified text and changing the text and/or formatting consistently.

Lesson 7: Working with Typography

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

Vertical spacing

Pages 163–167: The amount of space between lines and paragraphs affects the readability of text and overall feel of a design. To control vertical spacing, InDesign provides many features, some of which work together and others that override each other. These features include the baseline grid, leading, space before and after paragraphs, vertical justification, column balancing, keep lines together, and keep with next paragraph. All of these features can be included in paragraph styles, making it easy to make changes to multiple paragraphs in a single step. A couple notes about vertical spacing:

- Because both the baseline grid and leading control the amount of space between lines, you need to work with both options when using the baseline grid. You can set leading values to be equal to or less than the baseline grid option, otherwise type may skip to the next grid line, which may result in too much space between the lines.
- New students frequently use extra paragraph returns to add space between paragraph. All of these extra paragraph returns, however, should be removed. The Space Before and Space After options are the most consistent methods for adding space between two paragraphs.

Fonts, type styles, and glyphs

Pages 167–172: When working with type styles and glyphs, it's important that students understand that these features are built into fonts. Because all fonts are not created equal, these features are not always available.

Adjusting columns

Pages 172–174: Rather than threading multiple text frames, you can specify that paragraphs span multiple columns. In addition, you can automatically balance the text in columns. Using these features in templates can save layout time.

Hanging punctuation

Page 175–176: The feature, called Optical Margin Alignment, is a story attribute—it applies to all the text in a series of threaded text frames. It can, however, be turned off for selected paragraphs through the Optical Margin Alignment panel menu.

Drop caps

Pages 176–178: Many users do not realize that Drop Caps are a paragraph format, and therefore do not require you to select the characters to format as drop caps. Because of this, you can also specify drop caps in paragraph styles.

Letter and word spacing

Pages 179–180: Changing the kerning and tracking of headlines and larger type is often necessary. Make certain that your students understand the difference between kerning, which controls the space between character pairs, and tracking, which controls the space between a range of highlighted characters.

Adjusting line breaks

Pages 180–183: Precise control over line breaks—including which words hyphenate and where—gives layouts a professional edge. InDesign provides hyphenation settings, hyphenation dictionaries, Paragraph Compositors, and the ability to balance ragged lines. Be sure to explain the benefits of the Adobe Paragraph Composer, which considers line breaks in the entire paragraph when hyphenating and justifying text. The Adobe Single-line Composer considers only one line at a time and may produce less desirable spacing.

Working with tabs and hanging indents

Pages 184–188: Emphasize the importance of showing Hidden Characters while working with tabs. For hanging indents, explain the problems presented by “faking” a hanging indent with line breaks and tabs. Every time text is edited or its formatting changes, the text will reflow and leave gaps all over the text.

Paragraph rules

Pages 188–189: You can add rules (lines) above or below paragraphs through paragraph formats and paragraph styles. This is much quicker than drawing lines and anchoring them in text—or worse, drawing lines and moving them each time text reflows.

Questions

- 1 How can you easily apply a drop cap to all of the first characters used in multiple stories across a document?
- 2 What does pink highlight on text mean?

Answers

- 1 You can create a paragraph style that specifies a drop cap, and then apply it to the paragraphs where you want the drop cap to appear.
- 2 If text is highlighted in pink, the font applied to that text needs to be activated on your system.

Lesson 8: Working with Color

This lesson starts with an explanation of color management for both InDesign and the entire Adobe Creative Suite. Then, students take a more detailed look at the methods for creating, saving, and applying colors, gradients, and tints.

Color management

Pages 195–198: It's important for students to understand that colors do not look precisely the same on different devices (such as computer monitors and tablets) and different viewing conditions (such as in the dark or in sunlight). It's also important to understand that users can “manage” colors so they do look more similar from the beginning to end of a publishing process. Color management, however, is a complex topic better suited to more experienced students.

Proofing onscreen

Pages 198–200: Students should understand that the colors they see onscreen are affected by factors such as the quality of the computer monitor along with its characterization and calibration. Other options, such as View > Display Performance and View > Proof Setup, affect the onscreen display as well.

Preflight profiles

Pages 201–202: Explain to users that their output providers (commercial printers) can provide Preflight profiles that help ensure that their documents use the appropriate colors, fonts, stroke widths, and more.

Color swatches

Pages 202–207: Creating color swatches is similar whether you are mixing CMYK colors or choosing spot colors (such as a PANTONE color). Encourage students to work primarily in the Swatches panel, as it provides one central location for creating, saving, applying, and modifying colors.

Dashed strokes

Pages 206–207: While InDesign provides a great many stroke choices, you can also create customized stroke patterns by choosing Stroke Styles from the Stroke panel menu. These styles then become available in the Type drop-down menu in the Stroke panel.

Gradient swatches

Pages 206–208: More advanced students might experiment with creating gradients with more than one color. You can click on the bottom of a gradient ramp, between

the two stop colors to add an additional stop color. You can then change the additional color to meet your needs.

Tint swatches

Page 211: For consistent usage, you can save tints (or shades of colors, such as 70 percent black) as swatches.

Spot vs. process colors

Pages 212–213: New students invariably use colors that either will not reproduce or are too expensive to print. Emphasize the importance of keeping an eye on the intended output process when creating colors.

Type and object color

Pages 214–216: Because color can be applied to the stroke or fill of selected text or the background of a text frame, students need to follow the steps in this section closely.

Questions

- 1 How can you edit the name or attributes of a color swatch?
- 2 How do you create a new color swatch?
- 3 How can you change a spot color to a process color?

Answers

- 1 You can double-click on a color swatch to edit its name and attributes. Be careful that you do not have an object selected when you do this, as you may apply the color to the object at the time you click the swatch to edit it.
- 2 You can click the New Color Swatch button or choose New Color Swatch from the Swatches panel menu.
- 3 You can edit the swatch and change it to a Process color and change its Color Mode to CMYK and its Color Type to Process.

Lesson 9: Working with Styles

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

Basic styles

Pages 225: Explain that you can control default formatting by modifying the Basic paragraph, character, object, table, and cell styles.

Paragraph styles

Pages 226–228: Emphasize to students that you only need to click in a paragraph to apply a paragraph style—you don't have to select the whole paragraph. All the formats apply to all the text in the paragraph. If a paragraph style does not apply properly, check to see if any character styles, including Normal, are applied to the text. Also be sure that students understand the concept of overrides (exceptions to paragraph style formatting, indicated by a plus sign next to the style name).

Character styles

Pages 229–231: Character styles apply to selected text within a paragraph. Generally, users create character styles to quickly apply multiple formats (such as font, size, and style) in one click. You can also create a character style to easily apply a single format—such as Bold or Italic. When creating a character style, any formatting not explicitly identified in the New Character Style dialog will remain as-is after the application of the style. So, for example, a single style that applies the Bold format can be used to apply Minion Pro Bold and also Adobe Garamond Pro Bold.

Nested styles

Pages 232–237: If you have paragraphs that always start with a certain formatting pattern, you can combine character and paragraph styles together to build a nested style. Nested styles allow you to automatically style the first several words or characters of a paragraph using a character style—then, format the remaining portion of a paragraph according to the character formatting specifications in the paragraph style. The formatting occurs in a single click. If your students are advanced, you may want to have them add multiple character styles as a nested style or experiment with line styles.

Object styles

Pages 237–241: Object styles allow users to save formatting applied to frames—including formatting applied to text and graphics inside a frame.

Table and cell styles

Pages 241–247: Table and cell styles allow users to save formatting applied to tables and cells—including formatting applied to text inside a cell.

Updates to styles

Pages 248–249: You can update character, paragraph, object, table, and cell styles to match new formatting using the same technique. Updates to styles automatically affect all instances where the style is used.

Loading styles

Pages 250–251: If you’ve already created styles in another document, you can import them into another InDesign file using the Load command from the panel menu.

Questions

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

Answers

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

Lesson 10: Importing and Modifying Graphics

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

Missing and modified images

Pages 254–258: The Links panel displays a list of all graphic files that have been imported into a document. When you print an InDesign document, the original graphic files are sent to the printer along with the InDesign document. Remind students that they should watch for yellow triangles (which indicate images that may have changed since the time they were imported) and red stop signs (which indicate that InDesign cannot locate the original graphic file). Although it's possible to print and export InDesign documents that contain missing or modified graphics, this is generally not advisable because low-resolution versions of the modified/missing graphics are used instead of the original files.

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

Adjusting view quality

Pages 260–261: The Typical Display view setting is the default for imported graphics and uses a low-resolution image that's appropriate for identifying and positioning graphics. If you have a need to see the original, high-quality artwork, you can change the view setting for a particular graphic by selecting its frame with the Selection tool and then choosing Object > Display Performance > High Quality Display. You can change the view setting for the current document by choosing High Quality from the Default View menu in the Display Performance section of the Preferences dialog box. If you change the default view setting when no documents are open, the option you choose becomes the default setting for all subsequently created documents. Caution students that working in High Quality display mode all of the time can slow down performance.

Working with clipping paths

Pages 261–263: The Clipping Path dialog box lets you to mask out certain areas of a selected graphic by choosing Alpha Channel or Photoshop Path from the Type menu. These paths and alpha channels are stored within the original graphic files. The lesson shows students how to use the Detect Edges option in the Clipping Path dialog box to create a clipping path for a graphic that doesn't have one. Caution students against using the Detect Edges option for every image that requires a clipping path, as this can add significant size and complexity to a document. Photoshop is still the best option for most objects that require a clipping path.

Working with alpha channels

Pages 264–268: This lesson requires the use of Photoshop. If you are teaching a class that is focused on typography, you may want designate this lesson as optional. The

features covered in this lesson help InDesign users understand that the preparation of an image in Photoshop impacts the options for displaying the image in InDesign.

File formats

Pages 268–275: Although students work with .psd, .ai, and .pdf files in this lesson, you can use virtually any file format for practice purposes. InDesign supports formats such as .tif, .eps, and .jpg, to name a few. Native file formats (.psd and .ai) offer some advantages. For example, .psd files can include clipping paths, alpha channels, and layers, and InDesign provides access to all of these display-related elements, allowing the InDesign user to control how the graphic is displayed and output.

Using a library

Pages 275–278: As stated in the book, caution students about image linking in a library. If you add an imported graphic to a library and then copy the library item into a document, InDesign must still access the original graphic file when printing and exporting the document. If you embed a placed graphic (by selecting the graphic in the Links panel and then choosing Embed Link from the Links panel menu) and then drag the graphics frame into a Library panel, the graphic will be embedded in any document you later drag it into from the library.

Questions

- 1 Why is it important to maintain the link to the original file after you import a graphic?
- 2 What should you do if you want to display an imported graphic at the highest possible resolution in InDesign?
- 3 What is the benefit of adding clipping paths and alpha channels to graphics files?

Answers

- 1 Because InDesign uses the original source graphics files when printing a document, most graphics will not print at the highest possible resolution (nor will they export to PDF using the best possible resolution) if the link to the original graphics file has been broken. This can occur if the original file has been moved, deleted, or renamed.
- 2 Select the graphics frame with the Selection tool, and then choose Object > Display Performance > High Quality Display.
- 3 Adding clipping paths and alpha channels lets you control which portions of an image are displayed onscreen and printed without deleting parts of the image. Clipping paths and alpha channels are most often created using an image-editing program, such as Photoshop. If you import images with clipping paths or alpha

channels into an InDesign layout, you can print the image using any path or channel or you can ignore them and print the entire image.

Lesson 11: Creating Tables

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

Converting text to a table

Page 287: Text that contains delimiters (separators) for the row text and column text, can be easily converted to a table. To see the delimiters, be sure to show invisible characters (Type > Show Hidden Characters). For example, columns of text are often separated by tabs and rows are often separated by paragraph returns. It is very common for users of word processors to align text onscreen with multiple tabs; to convert text like this to a table, you will need to remove any extra tab characters.

Imported tables

Page 288: While importing tables created in Microsoft Word or Excel, you can specify which Excel sheet to import or choose a cell range or from a Microsoft Word document.

Table formats

Pages 289–293: You can format an entire table, including specifying formatting for alternating patterns of rows, and you can format individual or selected cells.

Table headers

Pages 294–295: Tables can be linked across multiple text frames, and table headers appear at the top of each frame containing the table.

Graphics in table cells

Page 295–296: The only way to place graphics in tables is as inline (anchored) graphics. They need to be copied and pasted or imported into a cell when you have a text insertion point (blinking cursor).

Table and cell styles

Pages 296–300: For quick, consistent table formatting, a table style can be applied when text is converted to a table. In addition, table formatting and individual cell

formatting can be saved as styles. As with other types of styles, these styles offer one-click formatting, consistency, and easy updating.

Questions

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

Answers

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

Lesson 12: Working with Transparency

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

Layers

Students are instructed to turn layers on and off throughout this lesson. Make sure to have students follow the instructions closely. If they discover that they cannot access something in the lesson because a layer is locked or hidden, instruct them to go to the Layers panel and correct the problem.

Colorizing grayscale images

Pages 303–305: Note that you can apply color to black-and-white and grayscale bit-map images, and you can also colorize the background color (that is, the fill color) of graphics (and other) frames.

Opacity vs. tint

Pages 307-308: Specifying an opacity value and specifying a tint value are similar but different in one important way. When you apply a tint to an object's fill or stroke, the fill or stroke gets lighter as the tint value gets lower, and the fill or stroke remains opaque. (A tint value of 0 makes the fill or stroke opaque white.) As you lower an object's opacity, the object gets both lighter in value and translucent (that is, objects beneath it become visible where they were previously obscured by the opaque object at 100% opacity).

Applying transparency effects to imported Photoshop and Illustrator graphics

Pages 309-314: Applying transparency effects to imported Photoshop and Illustrator graphics is the same as applying them to objects created within InDesign. That is, you can apply transparency effects to any object: a straight line, a text frame, a graphics frame, an empty polygon shape, and so on. Mention to students that although it's possible to apply transparency effects separately to the stroke of a frame, the fill, and the text within, in most cases the default choice (Object) in the Settings For menu in the Effects dialog box works best when applying transparency effects.

Applying transparency effects to text

Pages 313-314: Mention to students that although it's possible to add a drop shadow to the text within a text frame without adding a shadow to the frame's stroke or fill, it's not possible to add a drop shadow to individual text characters or to a highlighted range of text.

Applying other effects

Pages 314-320: You can apply a gradient feather to an object using any of several methods. One of the easiest ways is to select an object, then select the Gradient Feather tool and drag across the object. You can then edit the effect in the Effects panel. Time permitting, have students experiment with some of the other transparency effects using other text and graphic objects on the page.

Pages 319, step 12: Students may miss the mark when dragging the FX icon onto the green semicircle. If they miss, it's easy to undo and try again.

Editing and removing effects

Pages 320-321: The sheer number of controls in the Effects dialog box combined with the option to apply one or more effects separately to an object, its stroke, its fill, or the text within a text frame can make it difficult to keep track of which effects have been applied to which elements. Make sure that students realize that by using

the Clear Effects button, all effects are removed, including blending modes, opacity, and all transparency effects.

Questions

- 1 You can make an object's stroke or fill lighter by either lowering the tint or the opacity of the stroke or fill. What's the difference between lowering an object's tint and lowering its opacity?
- 2 What is the advantage of creating transparency effects within InDesign?
- 3 Why is it important for a page layout program to support transparency?

Answers

- 1 If you were to specify a 50% tint for the fill of an object and a 50% opacity for a copy of the object, you wouldn't be able to tell the difference between the two unless they overlapped other objects. An object with a 50% tinted fill is opaque; an object whose fill has a 50% opacity is translucent.
- 2 You can create transparency effects, such as soft drop shadows for text, using InDesign, Illustrator, or Photoshop; however, if you're working on an InDesign layout, using the program's built-in transparency features eliminates the less-efficient alternative: creating the elements using a separate program and then importing the graphic files into InDesign. If you need to modify something in an imported graphic, you must open the original file in the application used to create it, make changes, and then resave the file—considerably more work than modifying the element within InDesign.
- 3 Because transparent elements can be created using Photoshop and Illustrator, it is important that page layout programs have the ability to handle these items. Images with feathered edges or pictures with transparent elements (such as a glass) can be successfully used only in a page layout program that supports transparency in placed graphics.

Lesson 13: Printing and Exporting

The primary destination for many InDesign files is a printed publication. This chapter covers the tools for successfully printing with InDesign. Whether your publication is a brochure, package design, or newsletter, you need to know how to check the file for potential printing problems before they actually occur and how to achieve the desired results when printing. A large and ever-growing number of print service providers accept InDesign files, and you can also create PDF files for a variety of purposes—including high-resolution printing and online distribution.

Using the Preflight panel

Pages 327–330: Preflighting a document for potential printing problems is essential before handing off an InDesign file for final output. The Preflight panel lets you perform live preflight throughout the production process rather than waiting until final output is required. Preflighting as you work lets you identify and correct potential printing issues as soon as they occur. Whether you intend to provide the file to a commercial printer or a colleague, preflighting determines whether all files necessary to print the document are available and alerts you if you do something that violates the current preflight settings.

Using the Package command

Pages 328–331: In addition to collecting all of the files required to print an InDesign document, packaging a file is a great way to create an archived version of a document. Make sure that students understand that every time they package a file, they create copies of all of the imported graphic files and fonts, as well as the InDesign file. Once they've sent a package folder to the printer, they may want to delete the folder to avoid redundancy and save disk space, or they can make a copy of the folder on a different hard disk or CD before deleting the package folder from their hard disk. When you package an InDesign document, you also have the option to include an IDML version of the file that can be opened in earlier versions of InDesign, as well as a PDF version.

PDF quality options

Pages 331–332: Note that there are a variety of settings that control the quality of the final PDF document. It is important to select a setting that matches your needs for the final PDF. Using the High Quality Print PDF preset might be the best option for creating a PDF for proofing purposes, but this could produce an impractically large file to post online. If students have questions about the PDF/X options and you are unsure about how to answer them, you can find a wealth of information on the Adobe website. Go to www.adobe.com and search for PDF/X.

Separations Preview panel

Pages 333–334: You can preview individual color separations, ink coverage limits, and overprinting using the Separations Preview panel, but you cannot preview trapping, halftone screens, and resolution. You should work with your printer to verify these settings using integral or overlay proofs.

Printing a laser or inkjet proof

Pages 336–340: When working through this section, it is important to inform students who are not connected to a printer that they should either choose PostScript

File from the Printer menu and Device Independent from the PPD menu in the Print dialog box or choose an installed print driver. If they choose PostScript and Device Independent, some of the controls in the Print dialog box that are covered in this lesson are not available. Because of the number of printer manufacturers and models and the different ways a computer can connect with a printer, it's not possible to provide detailed printing instructions that apply to every possible situation. It is easy to adapt the tasks in this lesson to work with whatever printers and connections are available.

Using the Ink Manager

Pages 341–342: If you're working on a color publication, the Ink Manager provides an easy way to control the number of plates that are produced when the document is printed as color separations. It's especially useful for mapping spot colors to CMYK colors in a publication that will be printed using only CMYK colors.

Questions

- 1 If you print to multiple printers, what's the fastest and easiest way to ensure that you use the correct settings for all printers?
- 2 How can you confirm what ink separations will print?
- 3 What are some of the advantages of InDesign's integrated PDF export?
- 4 Why are there several different types of PDF files?

Answers

- 1 Create a print preset for each printer. For example, if you use a black-and-white printer to output some proofs and a color printer for others, you can create a print preset for each printer and choose the one you want at print time from the Print Preset menu in the Print dialog box.
- 2 You can use the Separation Preview panel or the Ink Manager. The Separations Preview panel displays a list of CMYK and spot colors and lets you show or hide individual colors. The Ink Manager displays a list of colors used in a document and lets you convert spot colors to process colors and map one color to another.
- 3 Because you do not need to generate PostScript files and then use Acrobat Distiller, the task of creating PDF files is simpler and faster than it used to be. The integrated PDF export also provides for enhanced PDF options that would otherwise not be possible, such as the inclusion of multimedia elements (sounds and movies) and buttons. Many print providers like to receive PDF files instead of InDesign documents because all files required to print a PDF—including fonts and imported graphics—are contained within the file.

- 4 You now have the option to choose Adobe PDF (Print) or Adobe PDF (Interactive) in the Export dialog box. If you choose Adobe PDF (Print), you can choose from a number of Adobe PDF Preset options in the Export Adobe PDF dialog box that determine the quality (and file size) of the resulting PDF file. Press Quality will create the largest file with the highest possible resolution; Smallest File Size is for documents that will be displayed online. You may need to export two PDF files if you intend to distribute a PDF file online and also use a PDF file for high-resolution printing. The Adobe PDF (Interactive) option in the Export dialog box is for documents that will be viewed online and include such elements as page transitions, buttons, movies, and sounds.

Lesson 14: Creating Adobe PDF Files with Form Fields

The ability to create form fields for PDF files is a recent addition to InDesign. The Buttons And Forms panel lets you create text fields, radio buttons, check marks, combo boxes, and signature fields, as well as buttons for printing, submitting a form by e-mail, and clearing a form. InDesign documents that contain form fields must be exported as Adobe PDF (Interactive) for the fields to work in the exported PDF file. It's worth noting that exported PDF files with form fields can be opened, filled out, and submitted using Acrobat X Pro; however, you must open the file in Acrobat X Pro and choose File > Save As > Reader Extended PDF to enable the file to be completed and submitted using Adobe Reader.

Adding and configuring form fields

Pages 347–351: Although you can convert any object into a form field, it's often easiest to use one of the preconfigured elements in the Sample Buttons And Forms panel as a starting point and then modify its appearance and function, if necessary.

A description for a form field is similar to a tool tip in InDesign. It's always a good idea to include descriptions with all but the most simple form fields to avoid confusion.

In addition to specifying the tab order for form fields using the Tab Order dialog box as the lesson describes, you can also use the Articles panel. Drag the form fields into the panel and arrange them in the tab order you want.

PDF buttons

Page 352: Once you've created a button in an InDesign document that you intend to export as Adobe PDF (Interactive), you can assign any of seven actions to the button: Clear Form, Go To Next View, Go To Previous View, Open File, Print Form, Submit Form, and View Zoom.

Exporting a document with form fields

Page 353: Because form fields are intended to be completed electronically rather than manually, you must save an InDesign document as Adobe PDF (Interactive) rather than as Adobe PDF (Print). Also, saving a document that's intended to be printed as Adobe PDF (Interactive) can cause printing problems.

Questions

- 1 What types of form fields can you create with InDesign CC?
- 2 What kind of form field provides a drop-down menu with a list of predefined choices?
- 3 What actions can you assign to a button in a document that will be exported as Adobe PDF (Interactive)?
- 4 You've created an InDesign document with form fields, and you want the exported Adobe PDF (Interactive) document to be opened, completed, and submitted using Adobe Reader. What must you do?

Answers

- 1 You can create text fields, radio buttons, check marks, combo boxes, and signature fields.
- 3 A combo box provides a drop-down menu with a list of choices.
- 2 The following actions can be assigned to PDF buttons: Clear Form, Go To Next View, Go To Previous View, Open File, Print Form, Submit Form, and View Zoom.
- 4 Open the exported PDF file in Acrobat X Pro and choose File > Save As > Reader Extended PDF.

Lesson 15: Creating and Exporting an ebook

EPUB is an open standard for creating reflowable content that can be optimized for display on a variety of devices with varying display dimensions. You can also display EPUBs on a computer using Adobe Digital Editions reader software, a free download from the Adobe website.

InDesign offers two choices for exporting EPUBs: EPUB (Reflowable), which exports the content in a way that allows it to flow automatically from page to page on any compatible ereader regardless of the dimensions of the screen, and EPUB (Fixed Layout), which creates EPUBs with fixed dimensions designed to fit a particular size screen. This lesson focuses on creation and export of an EPUB (Reflowable) publication; however, students get to see how EPUB (Fixed Layout) publications are created in the Exploring on Your Own section at the end of the lesson.

Because ebooks are different from print publications in many fundamental ways—variable page dimensions depending on the device, reader-controlled font sizes, no hyphenation, and so on—the process of creating an ebook is different from creating a print publication. It’s also worth noting that simply exporting a document that was designed for print publication as an EPUB does not produce an effective EPUB. For this lesson, students work on a document that’s designed from the outset to be an EPUB.

Working with graphics

Pages 359–361: Although you can place any type of graphic file into an InDesign document that will be exported as an EPUB, all graphic files are converted into either .jpg or .gif files during export. The Object Export Options dialog box lets you specify custom export settings for individual graphics frames. When exporting as EPUB, you have the option to maintain custom export settings or ignore them and specify global settings for images.

Mapping paragraph and character styles

Pages 362–363: Although it’s not required to map paragraph and character styles to export tags, doing so gives you greater control of the appearance of text in an exported EPUB. An EPUB file is essentially a web page, and the text-formatting options available for web pages are quite limited compared to the options available for print publications, which is why many of InDesign’s typographic features are not supported in EPUBs, including kerning and tracking, drop caps, hyphenation, and baseline shift, to name a few.

Choosing and ordering the content

Pages 364–367: The Articles panel lets you collect and arrange the objects you want to include in an EPUB. The simplest way to create an article is to drag an object, multiple objects, or a group of objects into the Articles panel. You can specify the order of export by rearranging the articles and the objects listed in the Articles panel.

Exporting an EPUB

Pages 368–371: When you export an EPUB, InDesign generates a single .epub file that contains the exported content. An .epub file contains one or more web pages in XHTML format, as well as all of the other components of the exported web pages, including graphics, fonts, and CSS styles. If you want to examine the files that make up an EPUB, change the file extension of the exported file from .epub to .zip and then decompress the .zip file.

Questions

- 1 What software application can you use to view EPUBs on a computer?
- 2 What graphic file formats can be imported into an InDesign document that will be exported as an EPUB?
- 3 How can you determine which objects are included in an exported EPUB and the order in which the objects are exported?

Answers

- 1 Adobe Digital Editions, a free download from Adobe's website, can display EPUB files.
- 2 You can import any supported graphic format into an InDesign document that will be exported as an EPUB; however, when you export the document, all graphics are converted into either .jpg or .gif format.
- 3 The Articles panel lets you choose the content you want to include in an EPUB and specify the order of export.

Lesson 16: Creating an iPad Publication

In the previous lesson (Lesson 15) students learn how to use InDesign to build and export documents in EPUB format for display on a variety of different electronic readers, including the Kindle Fire and the Barnes and Noble Nook. The Apple iPad provides another option for delivering digital publications, and it offers multimedia and interactive capabilities beyond what are currently possible with EPUBs, including panoramic graphics, pan and zoom graphics, web content, movies, and slideshows.

In this lesson, students create a “local” folio file that can be previewed onscreen using the free Adobe Content Viewer application. The lesson covers two important InDesign features: Alternate Layouts and Liquid Layout Rules. Both of these features allow designers to use the same content across two or more different-sized layouts within a single InDesign file and help streamline the process of simultaneously designing for multiple devices or different screen dimensions. When you're designing a publications for an iPad, the Alternate Layout and Liquid Layout Rules features simplify the process of creating both vertical and horizontal versions of every page.

Important: *To work on this lesson, students must first download and install Digital Publishing Suite, Single Edition from the Adobe Creative Cloud Download Center.*

Creating a digital publishing document

Page 377: The Intent menu in the New Document dialog box was added in InDesign CS5 and offered the option to create either Print or Web publications. The Intent

menu was extended in InDesign CS6 with the addition of Digital Publishing. When you choose to create a Digital Publishing document, the Page Size menu offers four common choices for digital delivery—iPhone, iPad, Kindle Fire/Nook, and Android 10"—as well as the option to specify a custom page size.

Adding interactivity

Pages 378–388: The Folio Overlays panel lets you add interactivity to InDesign objects. When an iPad user performs an action on an object to which you've added an overlay—for example, by pinching, swiping, or tapping the screen—the object responds based on the settings you've specified.

The Folio Overlays panel lets you add hyperlinks, slideshows, image sequences, audio and video, panoramas, web content, pan and zoom, and scrollable frames. Adding an overlay to an object is much like making other modifications, such as applying rotation or adding a drop shadow. The major difference is that the settings you make in the Folio Overlays panel apply specifically to objects that will ultimately be displayed on a tablet.

Previewing interactivity

Page 388: The Folio Overlays panel lets you add interactivity to objects; however, it's not possible to preview the interactivity within InDesign. Clicking the Preview button in the lower-left corner of the Folio Overlays panel switches from InDesign to Adobe Content Viewer, where you can use a mouse to test the objects to which you've added overlays.

Alternate layouts and liquid layout rules

Pages 389–390: There is no simple, perfect, and universally used method to simultaneously create multiple publications that share the same content. The ability to create one or more alternate layouts within a single document simplifies the process immensely. When you create an alternate layout, the content of the primary layout is automatically placed in the alternate layout using any liquid layout rules you've assigned. Also, the content in alternate layouts is linked to the content in the primary layout in a parent-child relationship. You can modify the content in any layout with the option to update a child object if the parent object has been modified.

Creating a .folio file

Pages 391–392: The Folio Builder panel lets you create new folios and then add articles to the folios you create. The Folio Builder includes three view options: folio view, article view, and layout view. Double-click a folio to display the articles it contains. Double-click an article to display the article's layouts. An InDesign user with a verified Adobe ID has the option to log in to the Adobe Digital Publishing Suite and

store folios on a web server or to store “offline” folios on a local drive, as students do for this lesson.

Questions

- 1 What is a folio?
- 2 Which InDesign panel provides controls for adding interactivity and multimedia to iPad publications?
- 3 What should you do if you want to create a publication that can be viewed on a variety of screen sizes?
- 4 What must an InDesign user do before starting this lesson?

Answers

- 1 A folio is a digital publication created using InDesign CS5.5 and later, along with the DPS Desktop Tools from Adobe. It can be displayed on an iPad or using the Adobe Content Viewer software application. Folios can include multimedia (sound and video), as well as interactivity such as pan and zoom graphics, scrollable text frames, and slideshows.
- 2 The Folio Overlays panel lets you add interactivity and multimedia to iPad publications.
- 3 The Alternate Layout feature lets you create layouts with different dimensions within a single document. When you create an alternate layout, the content of the primary layout is shared with the alternate layout and the layouts have a parent-child relationship. You can change parent and child objects independently, and you have the option to update child objects when a parent object is modified. The option to assign liquid layout rules to pages in alternate layouts helps streamline the process of redesigning the content of the pages in an alternate layout.
- 4 Before starting this lesson, students must first download and install the DPS Desktop Tools for Macintosh or Windows from the Adobe website.