# ADOBE
# InDesign
### CC

## A Complete
# COURSE
### AND
# COMPENDIUM
## of Features

## LESSONS
Master best practices
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## REFERENCE
Easily find and explore
key features and concepts

rockynook

STEVE LASKEVITCH

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# 1 Starting with a Solid Base

I am an opinionated InDesign user—like most. In this chapter, I'm going to make suggestions that I believe will make your time in the program more efficient. As you use InDesign, you'll develop your own ideas about what makes this program hum.

Photographer unknown

# Setting a Few Preferences

For our first project, these few suggestions on how to configure InDesign will do, but I have many more than are on these next few pages.

> The full discussion about customizing InDesign can be found in the first chapter of the Compendium, "Workspaces & Preferences." Or you can save that for later and be content with these few customizations.

## When to Set Preferences

To ensure that these preferences are set consistently for all the documents we create during this course, be sure to set them with no documents open at all. Many of the preferences are document-specific, but there's no way to distinguish them from those that are global (application-wide and applied to all documents).

## General

➡ To make our user experience as pleasant as possible, let's adjust our Preferences. It's quick and easy to get to this page of the Preferences: On a Mac, use the InDesign CC menu, on Windows go to Edit > Preferences. Or use the somewhat unintuitive shortcut ⌘–K/Ctrl–K.



Show "Start" Workspace When No Documents are Open This choice shows recent files, links to videos, etc., when no documents are open. Sometimes this is convenient. At other times, I wish to see my chosen workspace (the panels I have carefully arranged) whether documents are open or not. This ambivalence leads me to enable and disable this preference with some frequency. Luckily, it's quick and easy to get to this page of the Preferences. For now, let's disable it.

Content–Aware Fit   If you prefer to make your own cropping and composition decisions, I recommend disabling this as a default.
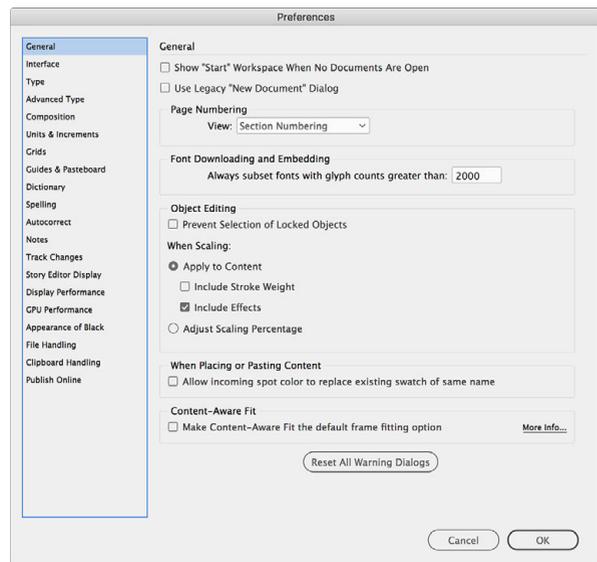
## Interface

This book makes extensive use of screenshots (pictures of my screen while using InDesign). To make these as legible as possible, I'm going to make InDesign's user interface a little less dark and murky. So that we both have similar experiences, you may wish to do the same.



Dark and
gloomy to
light and airy
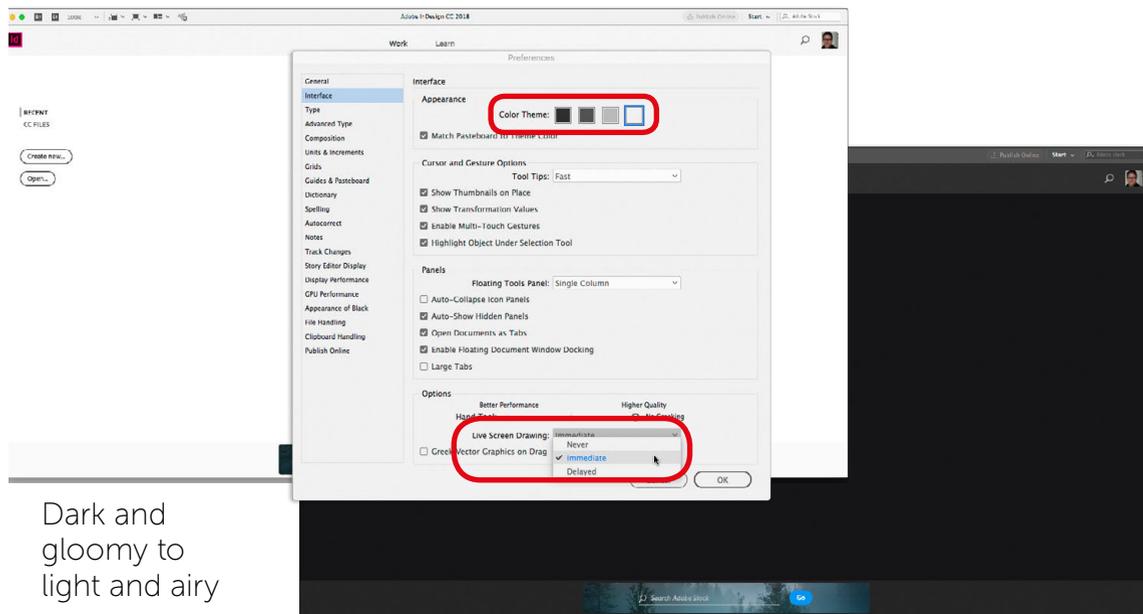
Color Theme   This doesn't actually have to do with colors at all; rather, it adjusts the lightness of the panels that surround your document window. I'm choosing the lightest option for two reasons: I find the small interface elements more legible both on screen and in the printed version of this book. Also, I do print my work, and the lightest interface presents a context that is more like holding printed material before one's eyes. Nonetheless, you should choose what suits your eyes best.

## Options

When scrolling with the Hand tool or moving or resizing objects, I prefer to see an accurate rendition of my layout. Thus:

Hand Tool   I suggest No Greeking for now. And what is *Greeking*? It's a placeholding approximation of images or text, usually boxes with X's in them for images and lines to represent text.

Live Screen Drawing   Choose Immediate so that as you drag objects across the page or resize them, you will know the result of that edit before you release the mouse. This is especially great when resizing text frames.

Normal text and image on the left, greeking on the right

## Type

**Apply Leading to Entire Paragraphs** I can think of very few instances in which I need to adjust leading on a character-by-character basis. This preference is document-specific, so I recommend setting it with no document open so it's in effect for all future documents.

**Smart Text Reflow** Although we won't need this for a while, I wanted to mention this powerful feature. If you place a 14-page Word document into a one-page InDesign document, InDesign can add the necessary pages at the end of a story automatically. Upon editing that text, you may no longer need as many pages, and InDesign can delete extraneous pages automatically as well.
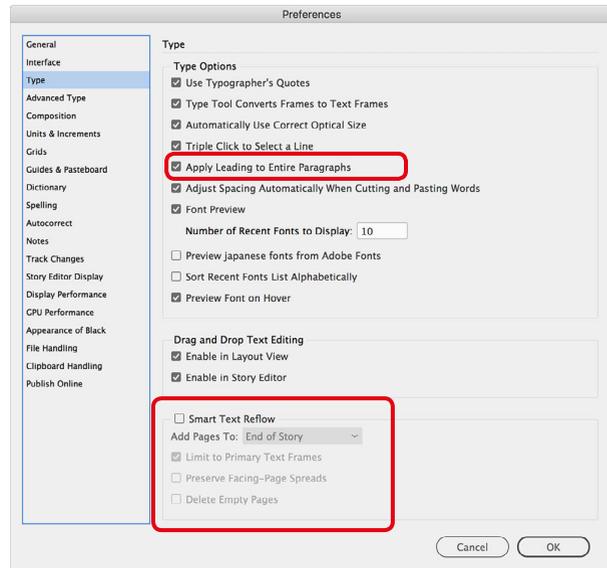
## Units & Increments

**Ruler Units** Note that your horizontal and vertical units of measurement can be different, and can be changed at anytime by right clicking on either ruler in the document window.

## Display Performance

Note the word "performance." These settings can enhance or degrade the speed with which InDesign displays text and images. The print quality of your document is not affected by these settings at all.

Default View   There are three choices. Fast doesn't display images at all, but instead shows gray boxes or shapes—rather brutal. By default, Typical shows a low-resolution "proxy" that InDesign generates for each image. High Quality renders images, graphics, and anything transparent without compromise. For the documents we will use during this course, we may use High Quality without much penalty. However, more complex documents will become sluggish unless you reduce the display performance view.

Adjust View Settings    You may customize the view settings to better tune the performance of InDesign. For example, you may want to adjust Typical to have low-quality transparency but high-quality vector graphics (AI and PDF files, for example) so your company's logo will look splendid when your boss sees it, and leave raster images (those made of pixels) as a proxy.



Fast

Typical

High Quality
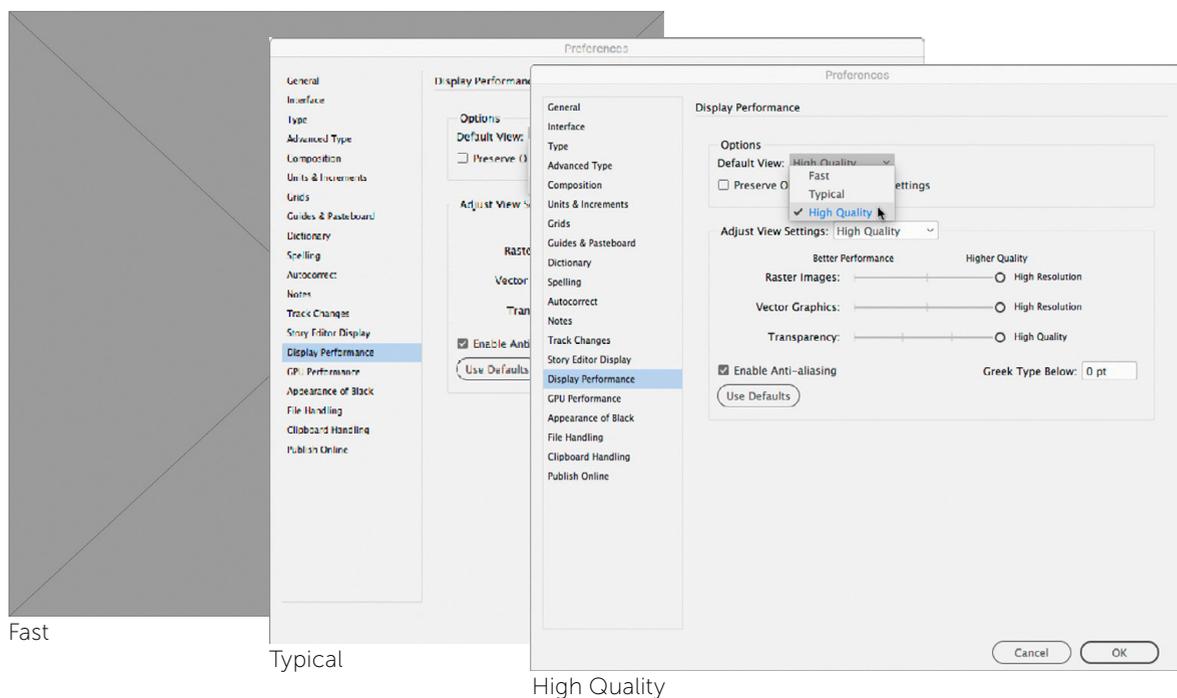
## GPU Performance (if present)

To better control zooming to specific objects, I recommend disabling Animated Zoom. I will assume this function is off when we discuss zooming and panning in later lessons.

Workspaces & Preferences

Frames & Content

Styles, Type & Fonts

Pages & Spreads

Color Management

Find/Change

Long Documents

Output

# Configuring the Workspace

Again, you should see the full discussion on customizing InDesign in chapter 1 of the Compendium, "Workspaces & Preferences."

## Choose a More Useful Initial Workspace

In the upper-right corner of the application, you'll see the Workspace menu next to the word "Start" or "Essentials." The InDesign team is perhaps a little too optimistic about how few panels you need to perform essential tasks in the program. Or maybe they're afraid to overwhelm you. Regardless, they're hiding truly important tools and functions to which you should have access.
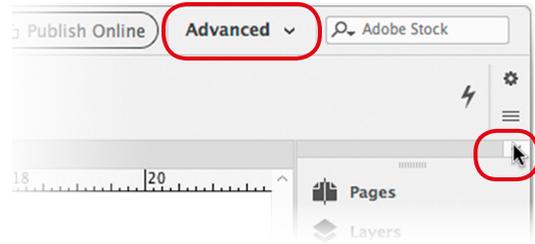
➡ So, from the Workspace menu, choose Advanced (fear not! There's nothing advanced here at all).



Control panel

Document window
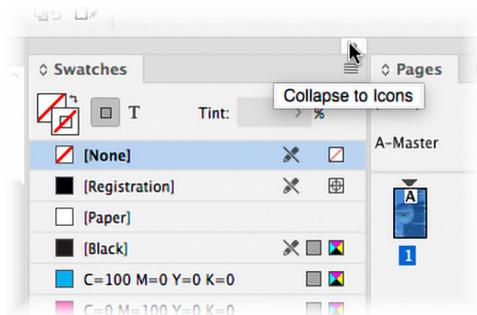
Workspace menu

Panels

Tools panel
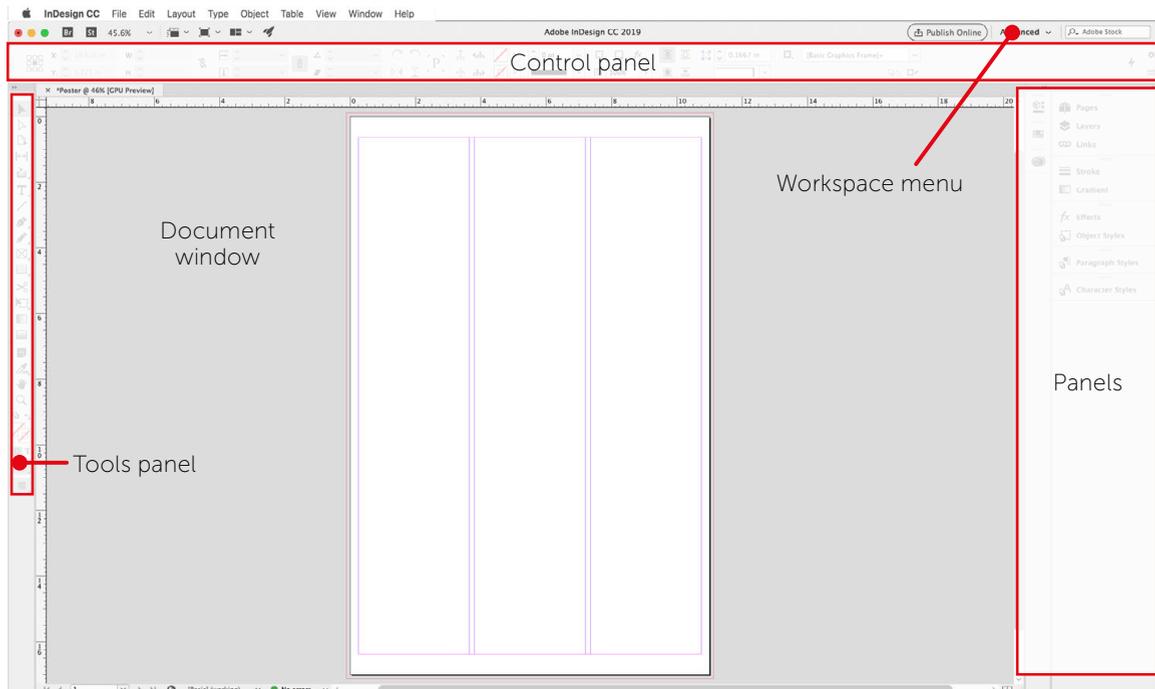
In the figure above, you can see InDesign's basic geography. If you're using Microsoft Windows, you'll notice that it's extremely similar to the view on the Mac from which this image

was made. The area where we work is called the document window. It is surrounded by panels. On the left is the Tools panel. You will soon learn that we switch tools very frequently. On the right are other panels—at the moment there are rather few. Later you will find the right side populated by a great number of panels. Just above the document window is the control panel. Luckily, here you can find many of the things you need to do your job that would normally be found in other panels.

At the top of the stack of panels is small button with << in it. When clicked, it expands the panels so you can see the panels' content. Clicking it again collapses the panels to icons.

You can adjust each panel's height by grabbing the "bar" separating them—watch for the two-headed arrow then drag to resize the panels above and below the bar.

Incidentally, while your attention is on the upper-right part of InDesign's interface, note the search field set to search Adobe Stock. A new user may wish to change this to search InDesign Help by clicking on the magnifier icon and choosing that option. Now, back to work.

## Create a New Workspace

➡ When the panels appear to be just as you'd like them (for now), capture that arrangement by returning to the Workspace menu and choosing New Workspace…. Give it a name: I'm going with "Real Essentials." If any of those panels go missing, or if there is a mess of panels in the way, you can choose Reset Real Essentials from that menu anytime.
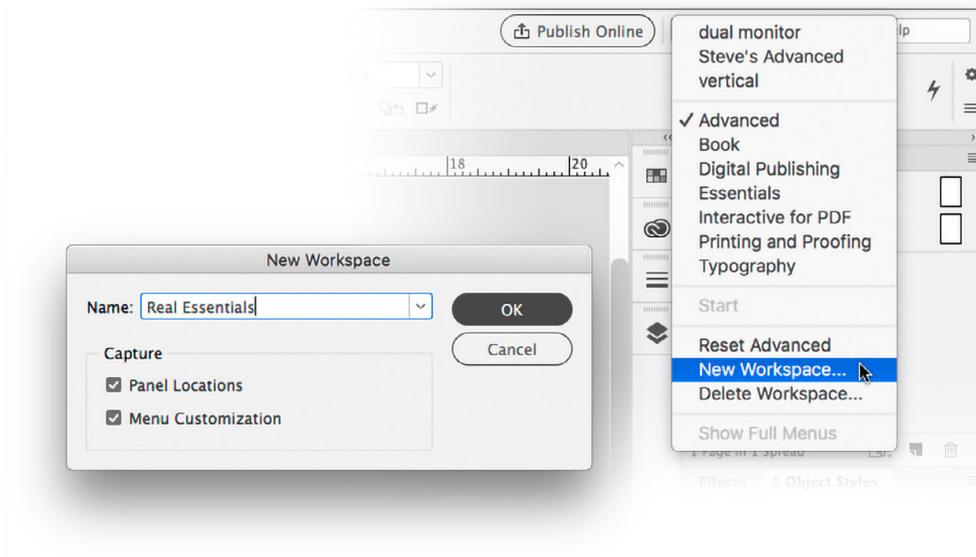
# Project: An Introduction to Layout

In the following lessons, we will learn the basics of creating a new document and populating it with styled text and carefully sized and positioned images. The result will be a fun and colorful poster.

# Lesson A: Create a New Document

Like with any endeavor, your work in Adobe InDesign will benefit from some preparation and setup. However, for this first "get to know you" project, we'll keep that to a minimum. Let's start creating a poster!

⮑ First, launch InDesign. Use the Creative Cloud app, as that's your "hub" for all Adobe apps. Once the program is running, you can create a new document either by going to File > New > Document… or by clicking on the Create New… button on the welcome screen. If you use the menu method, you'll notice a keyboard shortcut that does the job, too: on a Mac, it's ⌘-N (hold down the command key and type "n"), and on Windows, it's Ctrl-N (hold down the Ctrl key and type "n"). Hereafter, I'll indicate shortcuts in that order for Mac and Windows, respectively, like this: ⌘-N/Ctrl-N.
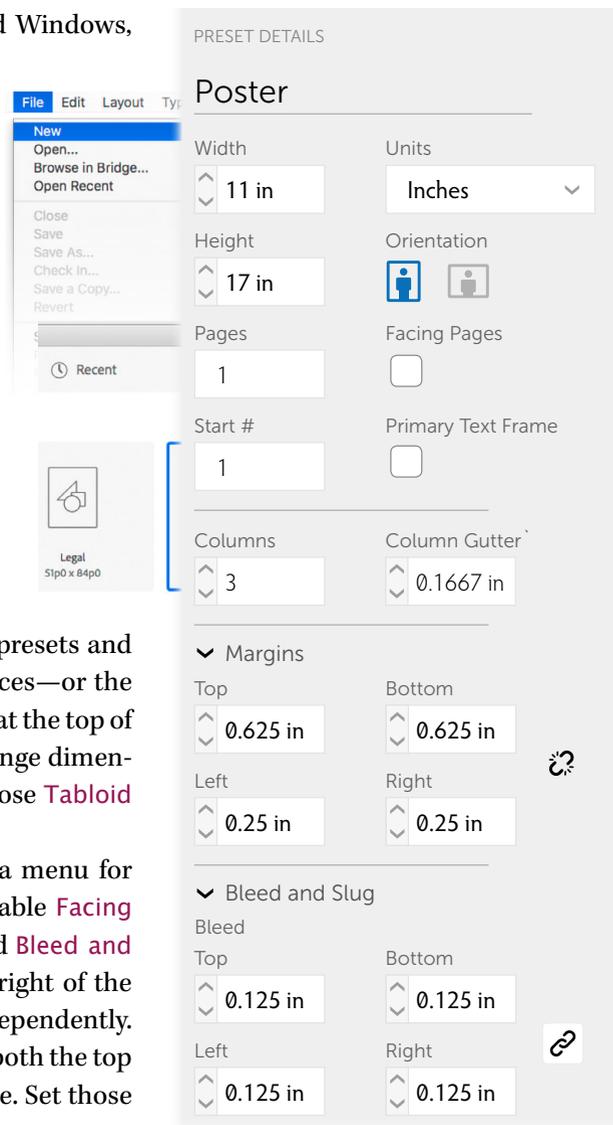
Now you're facing a large window with many presets and fields to fill out. Don't be daunted by the choices—or the units of measurement. Choose the Print intent at the top of the New Document dialog box. Ignore the strange dimensions (66p0 x 102p0) for the moment and choose Tabloid as your page size.

On the right side of the dialog, you'll see a menu for Units: we will use inches for this project. Disable Facing Pages and expand the choices for Margins and Bleed and Slug. You'll need to click on the chain to the right of the margin dimensions so you can set them independently. Now you can have a five-eighths inch space at both the top and bottom, and one-quarter inch on each side. Set those and the other fields as seen here.

**Note:** For fractions (like the 5/8" top/bottom margins or 1/8" bleed), just type the fraction! InDesign will convert it to a decimal. Click Create when you're sure the settings are correct. Your document should look something like the figure below.

➡ Choose File > Save As… to save your file. I'd suggest navigating to the folder you downloaded with all the files that accompany this book (see "Introduction"), and saving this file in the "Project 1" folder.

> What are margins and bleed? Good Question. Read the "Anatomy of a Spread" section in the Compendium chapter, "Pages & Spreads" (page 279).
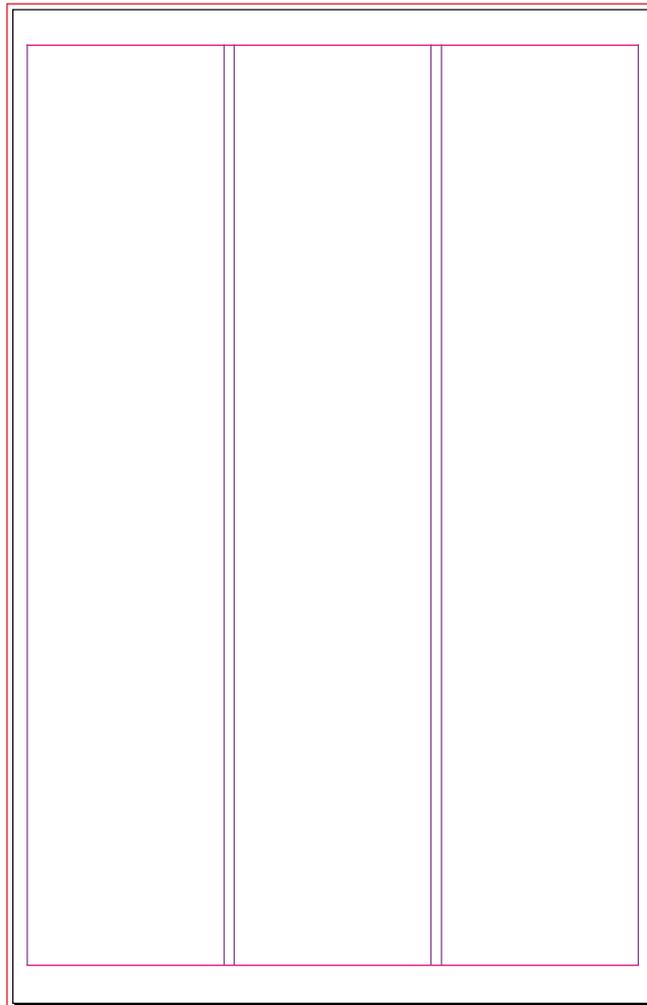


We will be *placing* two images onto this page and pasting some promotional text into a text frame. But right now, an empty canvas awaits us. Let's dress it up!

Workspaces &
Preferences

Frames &
Content

Styles, Type
& Fonts

Pages
& Spreads

Color
Management

Find/Change

Long
Documents

Output

# Lesson B: Placing the Images

In InDesign, everything—every letter, every image—has to be in a *frame*. For images, sometimes it's easy to have InDesign make a frame for you as you place an image. Often, we create frames first, and then insert images into them. That's the way we'll do it in this first exercise.

## Place a Large, Full-Bleed Image

➡ Locate the Rectangle Frame tool about halfway down the Tools panel (see figure below). Use it to draw a box from the upper-left corner of your bleed to the lower-right corner of the bleed. The image we are about to place will be slightly larger than the page (the black outline). If you find that the box you have drawn is not exactly in the right position or is not the right size, switch to the Selection tool, which is found at the top of the Tools panel. With it you can drag a corner of the box or the box itself to fine-tune its dimensions or position.

Selection tool

Rectangle
Frame tool
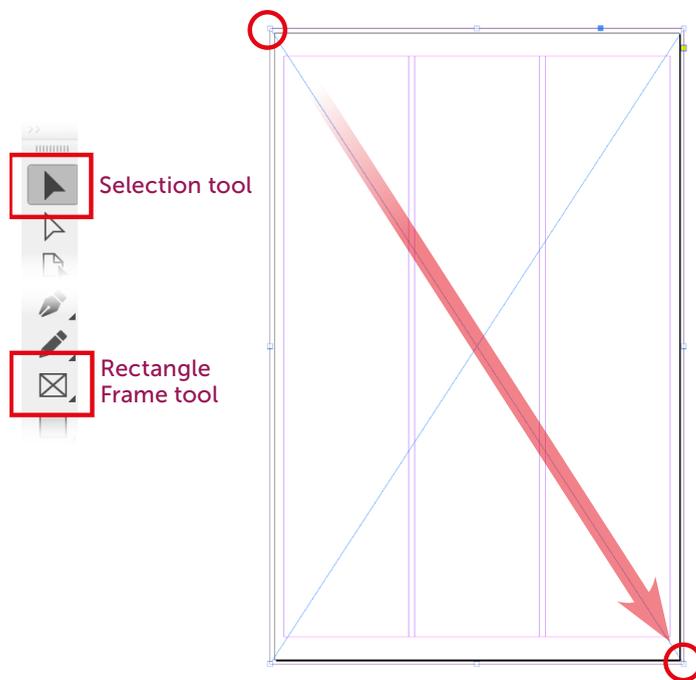
Use the **Rectangle Frame tool** to draw a frame from the far upper-left bleed (red lines beyond the black page edge) to the lower right.

Use the **Selection tool** to move or adjust the frame once it's drawn.

In fact, we use the **Selection tool** for many things. Good thing it's at the top!

➡ The frame is drawn; make sure that it is selected. Use the Selection tool to click in the middle of the box, and you will see that its control handles are visible. It's time to get the image!

➡ From the File menu, choose the command Place. Notice that to the right of the command there is a keyboard shortcut you could use instead. Over time, we will place many images, and it is likely you'll memorize that shortcut. For now, using the menu is perfectly fine.
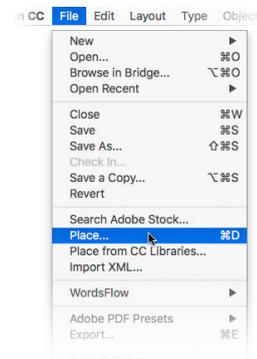
Do you remember where you put the downloaded course files? InDesign is asking you to locate the image you want to place. Navigate to your downloaded course files, and locate the "Project 1" folder. In it, you will find an image called *sky.jpg*. Double-click the filename, and the image will fill the frame you drew a few moments ago. Fortunately, the image was created at precisely the correct size to fill that frame. We will not be quite so lucky with the second image. Choose File > Save or use ⌘–S/Ctrl–S to save your file.

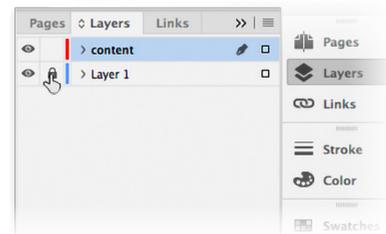## Layers: Stacking and Protecting Content

The image you just placed will serve as a backdrop to the other content we are adding next. InDesign offers several ways to prevent a user from accidentally moving or deleting content. The method I use most frequently is Layers.
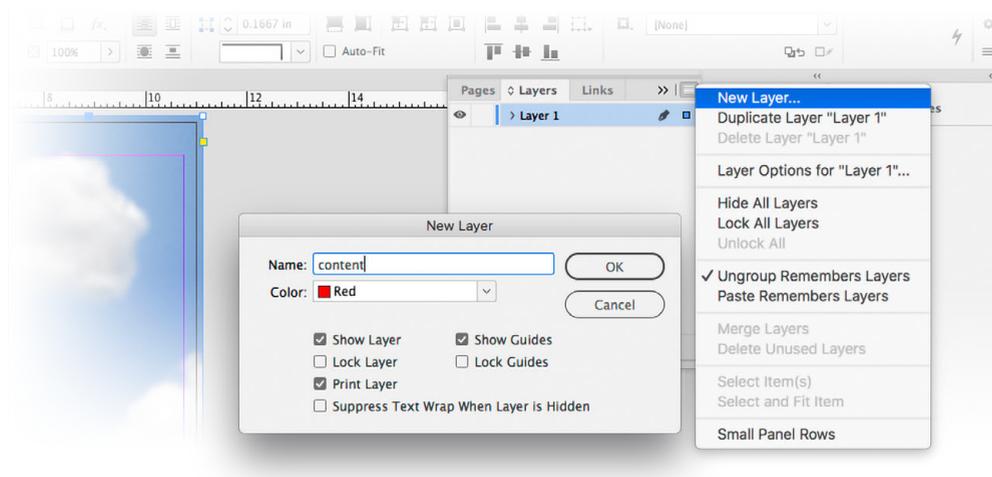


On the right side of your screen, locate the Layers panel. If it's missing, use the Window menu and choose Layers. Every panel in InDesign has a small menu in its upper-right corner. Unsurprisingly, these are called panel menus! The first item in a panel menu is the creation of a new... whatever that panel controls. So if you click on the Layers panel menu, the first item is New Layer…. This poster's text and a second image will be on a new layer that we'll name "content."

➡ Use the Layers panel menu and choose New Layer…. In the dialog box that appears, enter the name "content." When you select a frame on that layer, the frame edge will have the color you choose below the name. I will choose red. To commit your choice, press the Enter key or click on the OK button (they do same thing).



To prevent us from accidentally editing the sky image, we should lock the layer that it's on. In the Layers panel, you should see two eyes: one for each layer. Clicking on

Workspaces &
Preferences

Frames &
Content

Styles, Type
& Fonts

Pages
& Spreads

Color
Management
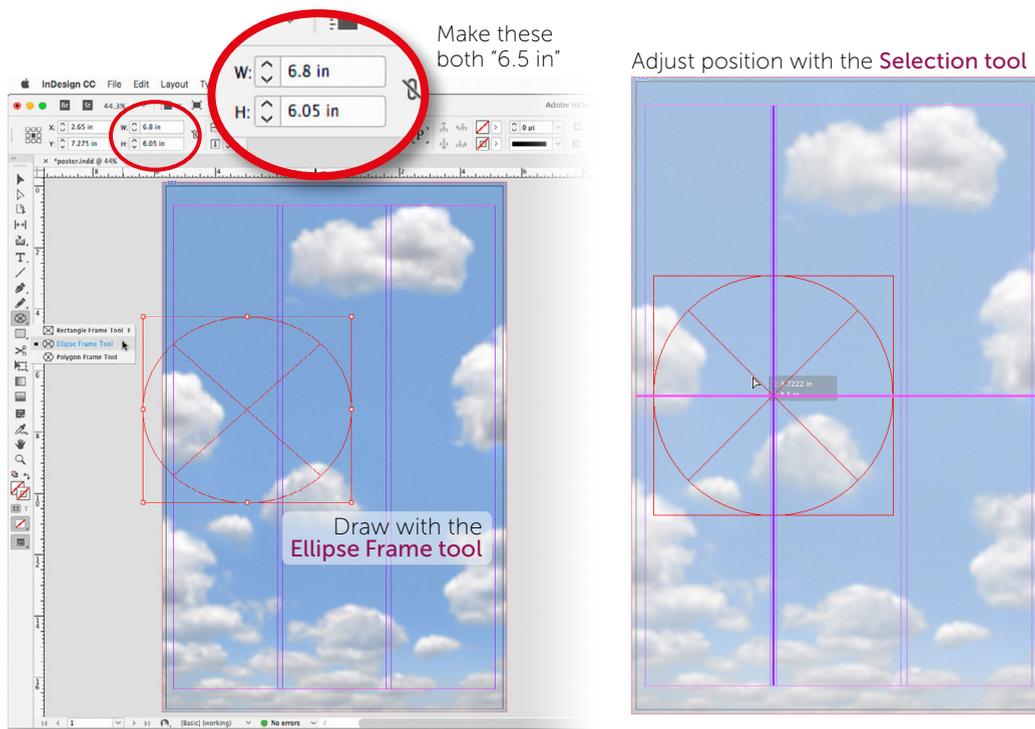
Find/Change

Long
Documents

Output

an eye hides a layer, and clicking there again reveals it. The space to the right of an eye holds a padlock that prevents the editing of that layer.

➡ To protect *Layer 1*, click to the right of its eye. To edit our new *content* layer, click near its name to highlight it. Now we're ready to add more stuff.

## Create an Empty, Elliptical Frame

See all those tools on the left side of the InDesign workspace? Almost every one of them is actually the first of several in a group. If you right-click on the Rectangle Frame tool, two other tools are revealed. Mac users: either use a two-button mouse or use your mouse system preferences to add a "secondary click" function to your Apple Magic Mouse—it's worth it.



Make these
both "6.5 in"

W:  6.8 in

H:  6.05 in

Adjust position with the **Selection tool**

Draw with the
**Ellipse Frame tool**

➡ Choose the Ellipse Frame tool and drag out a loosely shaped ellipse somewhere on the left side of the page. We'll refine its size and position in a moment. If you make a mistake, you can undo it by choosing Edit > Undo (like in any software application) or using the universal shortcut ⌘–Z/Ctrl–Z. To fine-tune the size, we'll make this ellipse a perfect 6.5 x 6.5-inch circle by entering those dimensions in the width and height fields in the Control panel.

➡ Switch to the Selection tool to fine-tune the position of the circle.

➡ As you drag the circle, you'll see purple or pink lines appear now and then. These are called Smart Guides and they tell you when your object is aligned to some part of the

page, margins, columns, or even some other objects! When a Smart Guide appears, its end points tell you what your object is aligned to. Move your circle slowly up and down, and you'll see a pink line appear from the left edge of the page to the right when you're centered vertically. A purple line appears when you're aligned between the first and second column guides. This is where I'll leave this frame, but its exact position is up to you. We'll see how this frame looks with an image in it and when there's text on the page.

➡ Save! Choose File > Save or use ⌘–S/Ctrl–S.

## Place an Image into That Circle

➡ Part of this should sound familiar. With the circle selected (via the Selection tool), choose File > Place… and navigate to your Project 1 class folder (you might already be looking at it: InDesign usually brings you to the last folder from which you placed an image). Choose the image called *airship.jpg*.

You should find that the image fills the ellipse and that you can see only a small bit of it. No worries!

➡ Right-click within the circle (I'd recommend off-center). A rather long menu appears, filled with items that could be useful when editing an image frame. Choose Fitting > Fill Frame Proportionally. This sets the image to fill the circle, but crops as little of it as possible.
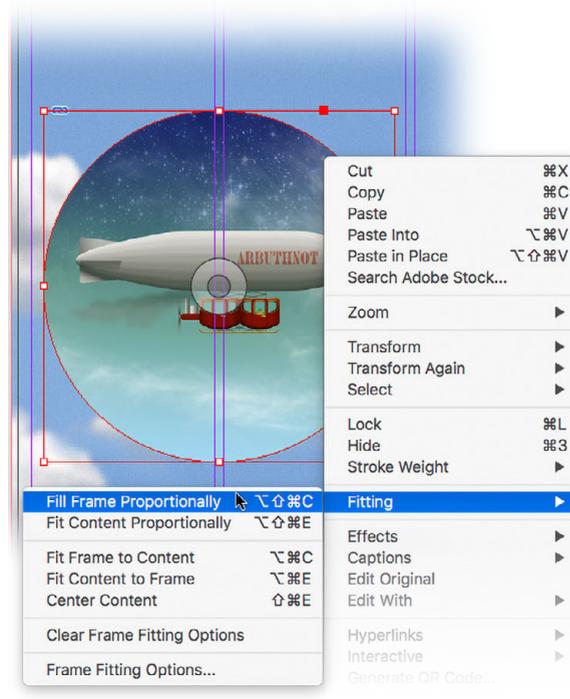
Frames can be decorated, even if they have images or text in them. In this case, we'll add a border, or, as we call them in InDesign, a stroke.

## Add a Colorful Stroke to the Frame

With the circle still selected (select it with the Selection tool if you need to), expand the Color panel on the right side of the screen. In that panel's upper-left corner are two small boxes, one overlapping the other. The one that is slightly higher and to the left of the other is for filling a frame with color. The other one with a gap in the center is for designating a stroke color.

⮕ Click on the stroke box to bring it to the fore, and move your cursor over the small rainbow at the bottom of the Color panel.

Your cursor will turn into a small eyedropper with which you can choose a color. A red, like the undercarriage of the airship in the picture, should make a nice accent.

The color you choose from the rainbow is, at best, approximate, so it's likely not exactly what you want.

⮕ Fine-tune your color choice with the sliders above the rainbow. Here, the sliders are showing colors as CMYK (Cyan, Magenta, Yellow, blacK) and I will leave them that way for now. As you can see in this figure, I thought the following values worked well: 25, 100, 100, and 25, respectively.

In a few moments, we will be adding text—perhaps the title can also be in this same color, so let's save it. Note that the Color panel, like the Layers panel earlier, has a panel menu in its upper-right corner. From this menu, we can choose different ways of designating color (Lab, RGB), and we can add this particular color to our swatches panel so we can easily select it later.

Just above the Color panel is the Stroke panel. From its many options we need only to choose the weight of the stroke (the current weight, or thickness, of the stroke is only one point—almost too small to see).

⮕ Set Weight to 10 points.
⮕ Save! File > Save or use ⌘–S/Ctrl–S.
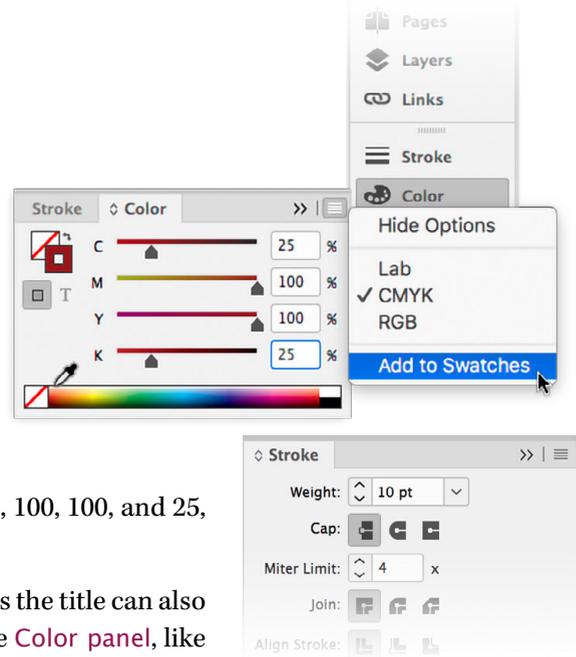
So far, our poster is looking pretty good, but it is missing one rather conspicuous element: words! Just a little word of warning before we move on: when using your Selection tool, beware of the those concentric circles in the center of an image over which your cursor hovers. That's called the Content Grabber (also known as the "Donut," a nickname preferred by many). If you unintentionally (or, of course, intentionally) drag it, you will dislodge the image from its frame! That is its intent: to allow you to recompose images within their frames. Later, we'll see how we can crop an image by resizing its frame, and then recompose it using the Donut. But now, a word about words….

# Lesson C: Adding Text

## Procure a Few Fonts

We should have fonts that go with our Victorian/Steampunk-themed poster, so I've come up with a way for you to get a few nifty fonts quickly, provided the computer you're using can currently access the Internet and the Creative Cloud app is running (see the Introduction).

➡ In the Project 1 folder is a file called ***TheFonts.indd***. Open it by double-clicking on the file-name, or from within InDesign by choosing File > Open…. You will almost instantly get a message that there are **missing fonts**. Don't be alarmed, but don't dismiss this warning: we need that dialog box.

Having just reread that dialog box, I'm impressed with its clarity and plain language—so much better than messages like "unknown error occurred." My synopsis: the three lines of text each use a different font. Those fonts are not installed on your computer, but they are all available from Adobe Fonts (formerly called Typekit). In InDesign, pink highlighting identifies text that wants to use "missing" fonts.

➡ In this document, click the Activate button and the missing fonts will be installed. It may take a bit, so take those moments to marvel at the work you've done so far. Well done!
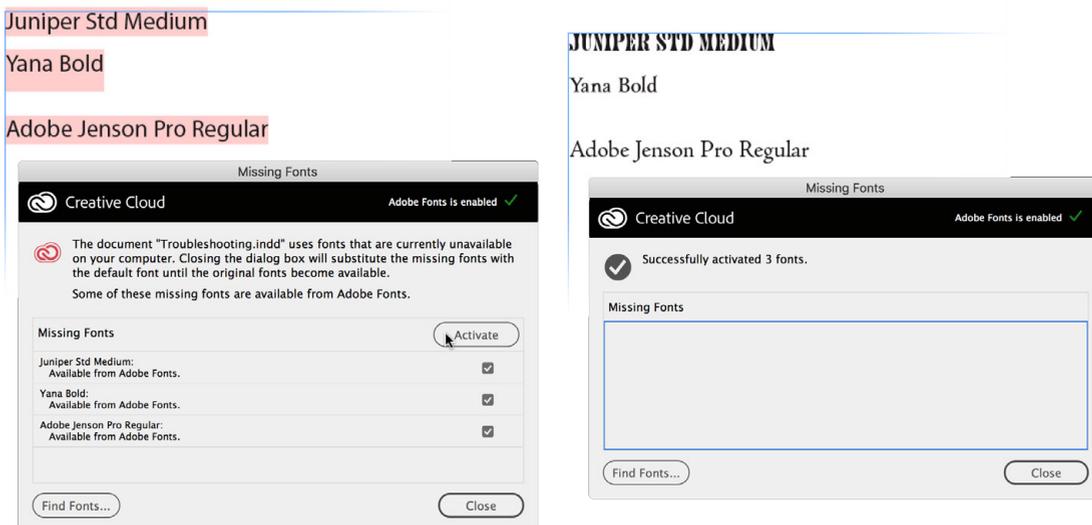


When the fonts have completed syncing, you'll be notified in that same dialog box, which you may now close.

Workspaces & Preferences

Frames & Content

Styles, Type & Fonts

Pages & Spreads

Color Management

Find/Change

Long Documents

Output

➡ Also, close the document *TheFonts.indd*; it's done its duty. We now have fonts we can use in any document. The order in which they're listed above happens to be the order in which we'll use them, too. Juniper will be our title font; Yana, our subhead; and Jenson will be for our body copy, which occupies most of the reader's time (like these words).

## Add a Text Frame and Text

I have another file for you to open, but not in InDesign. Again, it's in your Project 1 folder. It's called *PromoCopy.txt*.

➡ Double-click this file, and it will likely open in TextEdit (on a Mac) or Notepad (on Windows). It is simply a plain text file with the promotional copy we want to use for our poster. When you open this file, highlight all the text and then copy it. You can use the shortcut `⌘-C`/`Ctrl-C` to copy, as you can in InDesign or any text-editing application.
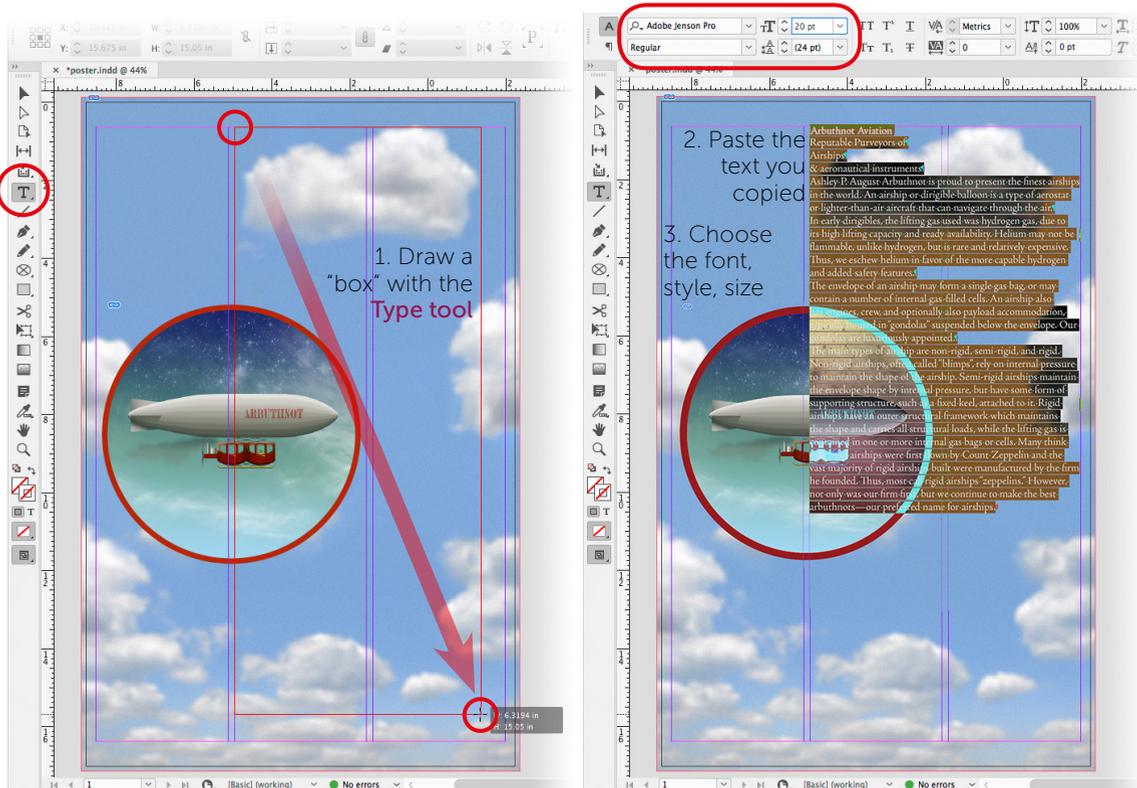


➡ Back in InDesign, choose the `Type tool` (the big "T" in the `Tools panel`) and draw a box covering the second and third columns, using the guides to, eh, guide you.

Remember, you can adjust the size and shape of this box later. Once the box is drawn, you'll see the text cursor blinking in its upper-left corner.

➡ Paste the text we copied from that text document by pressing ⌘-V/Ctrl-V, or by going to Edit > Paste. Other shortcuts that you might know from other programs like Microsoft Word can be used in InDesign as well.

➡ Let's use one of those shortcuts now. Press ⌘-A/Ctrl-A to select all the text so we can format it. To start, let's set one of those fonts we procured: Adobe Jenson Pro Regular. Make sure all the text is highlighted, then choose that font and style from the Control panel or the Properties panel, as well as a legible body copy size for a poster—say, 20 points.

➡ Save! File > Save or ⌘-S/Ctrl-S.

You probably noticed that the text is currently obscuring an image. That detail is one we'll take care of at the end.

## The Title and Subhead

Just above, I wrote that there are features (like shortcuts) that function in InDesign the same way they do in other applications. If the Type tool is still active, click once somewhere in the text frame. As you might expect, the cursor is blinking at that location. Now double-click on a word and you'll see that it's highlighted, just as it would be in any other program. InDesign can go further: triple-click, and yes, a whole line gets selected. Quadruple-clicking selects an entire paragraph and quintuple-clicking (a rare phrase!) selects the entire *story*. I prefer these noisier methods rather than clicking-and-dragging the cursor because I sometimes miss characters when I use the latter, slower method.

Before we select and carefully size and style the top lines of text, let's be sure the frame is the right size.

➡ From the Tools panel, choose the Selection tool again. Adjust the size of the text frame by dragging its handles until they snap onto the guides. Sometimes, I have to drag too far, release, and then drag the handles back so the frame snaps nicely to the guides. Double-clicking in the text frame switches quickly to the Type tool. With all the clicking you're doing, anyone nearby will think you're very busy!

➡ Now let's select the top line, "Arbuthnot Aviation." Since it's also a paragraph, you can either triple- or quadruple-click to select it. Change the font to Juniper, then adjust the type size in the Control panel or the Properties panel using the menu or the small up/down arrows next to the *size* field: ⊤⊤ ↕ 11 pt ▾ . I found 58 points worked nicely.

➡ Let's make this title the same color as the circle's stroke. With that text still selected, choose its color from the Fill menu in the Control panel (see the following figure).
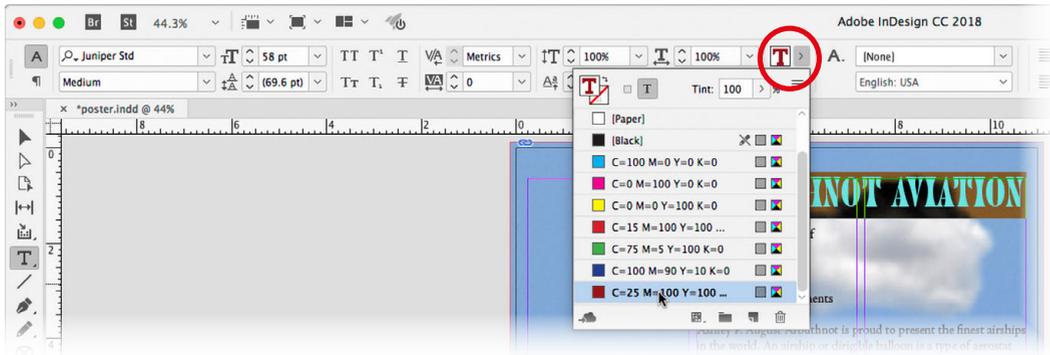
➡ Select the subhead lines, "Reputable Purveyors of Airships & aeronautical instruments." I think the font Yana would be just right here, but the size of each line (each is a paragraph) and the space between them will need adjustment.
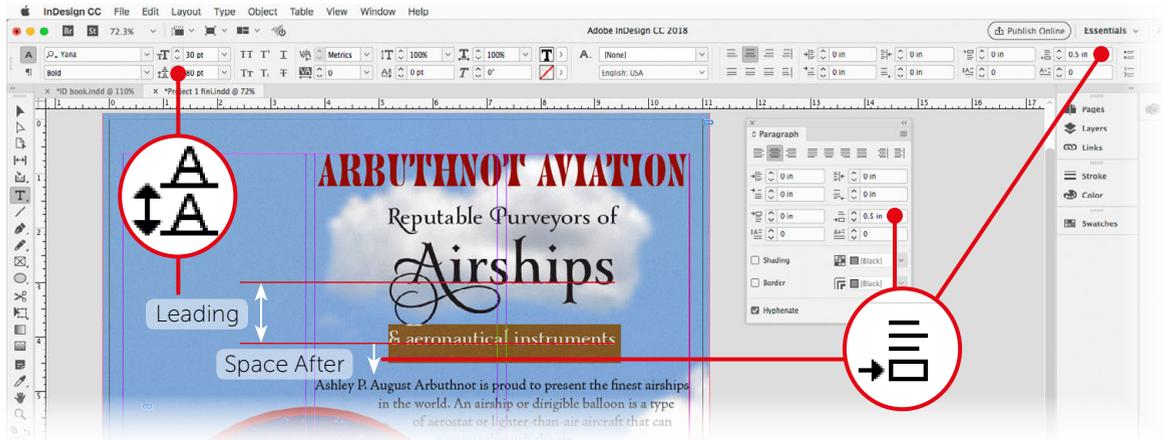


Look at the figure above.

➡ To push the letters of one line down away from the line above it, we select that whole line and adjust its *Leading* (named for the metal—lead—once used to separate lines of metal type).

➡ To push the text below a selected paragraph downward, we use *Space After*.

Both of these functions can be found in the Control panel, if there's room. If you're using a small screen and can't find the Space After field on the right side, summon the Paragraph panel: Window > Type & Tables > Paragraph.

➡ Before making final decisions about each line's size, leading, and spacing, let's add some flourishes that the Yana font allows. Highlight the "A" in "Airships." InDesign notes that the font designer provided alternate *glyphs* (characters) for the highlighted one and shows you a few. If there are more than a few, an arrow at the end of the list invites you to "View more Alternates." Let's!

➦ Clicking that arrow summons the Glyphs panel, which shows all of the alternates for the letter you've selected. To choose one, double-click it. Each time you do this, a different alternate takes the place of the previous. I chose one with extra swirls. I also chose alternates for the "R" in "Reputable" and the "P" in "Purveyors." Now that we have our text with the appropriate glyphs, we can better situate it.
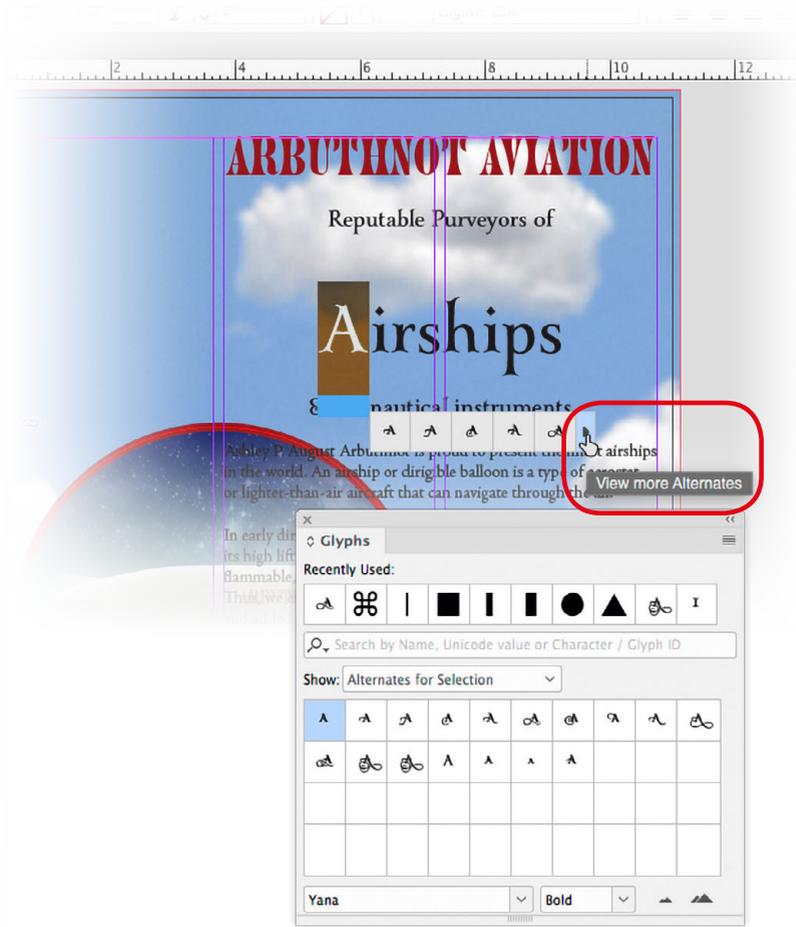


➦ Select each line in the subhead (triple-click!), and experiment with its size and leading. My choices were as follows:

| | | | |
|---|---|---|---|
| "Reputable Purveyors of" | size: **35 pt** | leading: **50 pt** | space after: **0** |
| "Airships" | size: **90 pt** | leading: **80 pt** | space after: **0** |
| "& aeronautical instruments" | size: **30 pt** | leading: **80 pt** | space after: **.5 in** |

➦ One last typographic touch: select all the text (quintuple-click!) and uncheck Hyphenate in the Paragraph panel (or the Control panel if the checkbox is there). Much better! Now get the Selection tool.

## Add Text Wrap

This is our last tweak to the poster. The picture of the airship is currently partially obscured by the text.

➡ Using the Selection tool, click on the left half of the circle (the right half is under the text frame, making it more difficult to get at). We can now add a kind of force field called Text Wrap that will push text away from our shape. Go to Window > Text Wrap, and its panel appears.
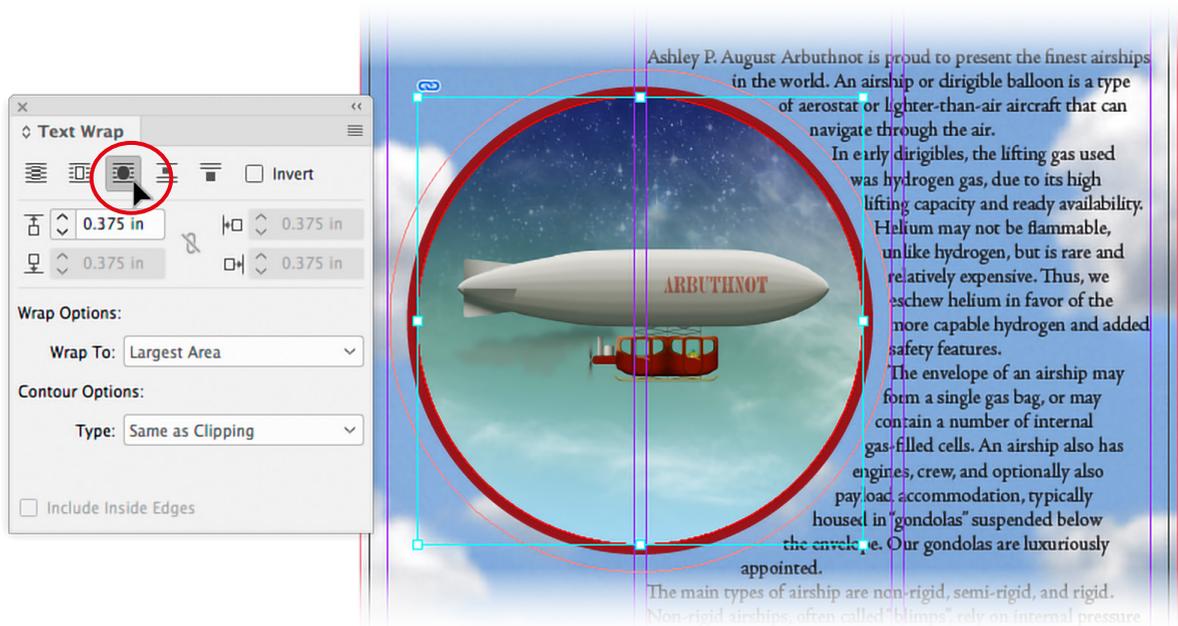


The first button is the Text Wrap off switch.

➡ To conform to our circle, we need the third button, "Wrap around object shape." Use the small arrows below that to increase the offset.

**Warning:** Don't try to move that circle until you either hit the esc key on your keyboard or click on nothing with the Selection tool first. Because of a quirk with this type of Text Wrap, you could dislodge the image from its frame!

➡ Save! File > Save or ⌘-S/Ctrl-S. And, unless you'd like to show someone first, you may close the document via File > Close or ⌘-W/Ctrl-W.

## That's It!

Congratulations! You've made your first InDesign publication. There are many features and functions we skirted, and some further customizations to InDesign that will help us work more easily. The next chapters will contain exercises to familiarize you with important

ingredients that we use when cooking with InDesign. So, when we get to our next project, you will know better what you may wish to include.



Workspaces & Preferences

Frames & Content

Styles, Type & Fonts

Pages & Spreads

Color Management

Find/Change

Long Documents

Output