

CHAPTER 1

INDESIGN BASICS

InFocus

WPL_N101

Before you can race off and create a new document, it is wise to take some time out to study the InDesign document window and the features available in the software. By developing an understanding of the workspace you should be able to create documents more quickly and effectively.

In this session you will:

- ✓ learn how to start **Adobe InDesign CS5**
- ✓ learn how to open an existing document
- ✓ gain an understanding of the **InDesign** workspace
- ✓ gain an understanding of the features of the **InDesign** workspace
- ✓ gain an understanding of panels
- ✓ learn how to display and hide panels
- ✓ learn how to float and dock panels
- ✓ learn how to save a workspace
- ✓ learn how to navigate a document
- ✓ learn how to zoom in to and out of a document
- ✓ learn how to use keyboard shortcuts
- ✓ learn how to use a shortcut menu
- ✓ learn how to save and close a document.

STARTING ADOBE INDESIGN CS5

Before you can start to create documents, you must start the program that you intend to use. Adobe InDesign CS5 is an application program that can be **started** by selecting it from the **Start**

menu, by double-clicking on an icon on the desktop, or by opening an existing document that was created in InDesign. In this exercise we will show you how to open InDesign from the menu.


Try This Yourself:

Before starting this exercise you MUST ensure that Windows has started...

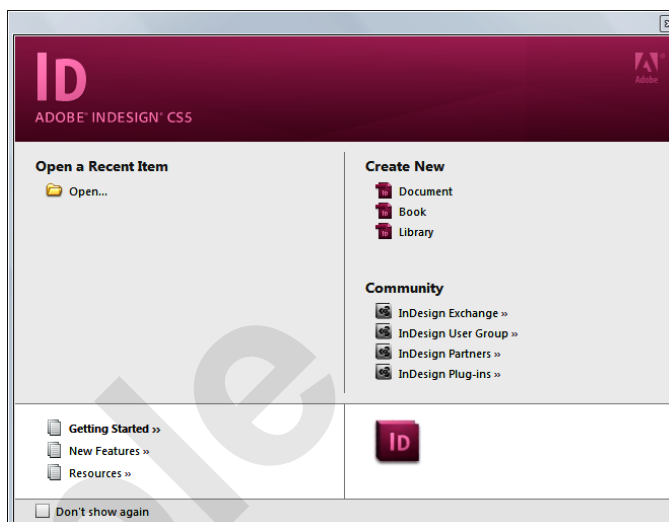
- 1 Click on the Windows **Start** button, located in the bottom left corner of the screen, to display the **Start** menu
- 2 Click on **All Programs** to display the menu, then select **Adobe InDesign CS5** to launch the application

Your Start menu may vary to the one described here. For instance, Photoshop may have been installed with the rest of the Adobe Design Premium Suite...

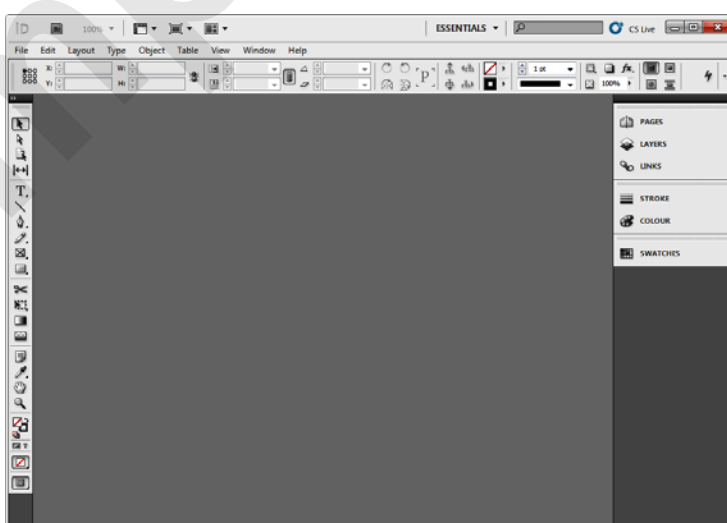
After InDesign is loaded, a panel will be displayed. From here you can select from a range of options for opening a document. For now, we'll just open InDesign without a document...

- 3 Click on **Close**  to close the panel
- An empty document window will be displayed*

2



3



For Your Reference...

To **start Adobe InDesign CS5**:

1. Click on the Windows **Start** button
2. Select **All Programs**
3. Select **Adobe InDesign CS5**

Handy to Know...

- If you want to start **Adobe InDesign CS5** from the desktop, look for the **ID** icon:





OPENING AN EXISTING DOCUMENT

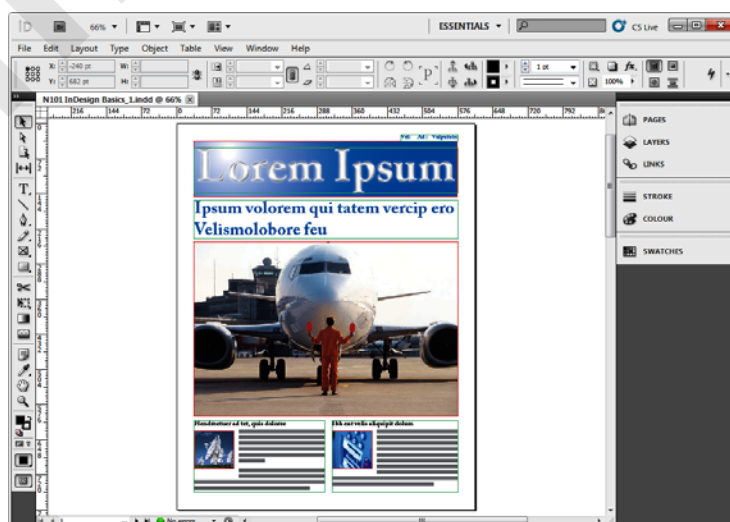
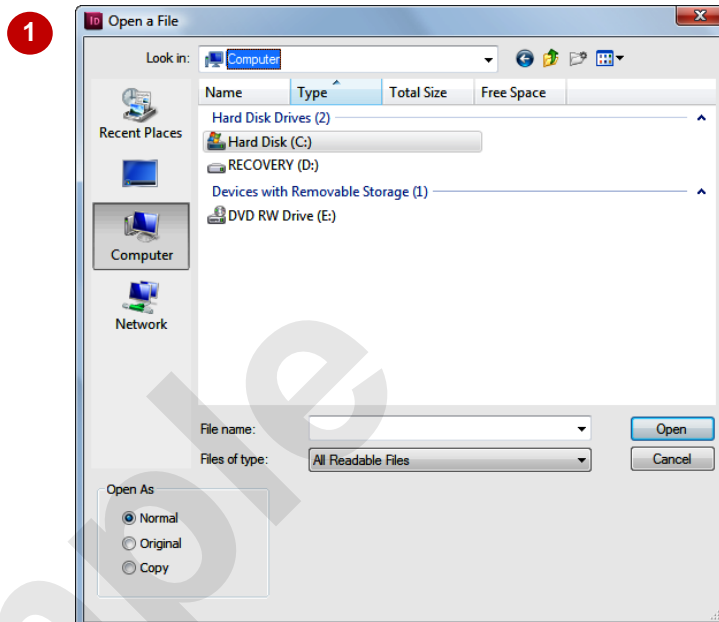
Documents can be opened in Adobe InDesign in several ways. You can open them from within InDesign itself, or launch InDesign by opening an InDesign document from Windows Explorer. You

would most likely **open an existing document** so that you can review or modify it. In this case we will open an existing document so that we can use it to demonstrate the InDesign workspace features.

Try This Yourself:

Before starting this exercise you MUST ensure that InDesign has started...

- 1 Select **File > Open** to display the **Open a File** dialog box
 - 2 Click on the drop arrow  for **Look in**, click on **Hard Disk (C:)**, then double-click on **Course Files for InDesign CS5** to open the folder
 - 3 Click on **N101 InDesign Basics_1.indd**, then click on **[Open]**
- This document was created from one of the standard templates in InDesign. Don't worry if you can't read it – the placeholder text is in Latin!*
- 4 Click on **Maximise** , if necessary, to make the best use of the available space



For Your Reference...

To **open** an existing **document**:

1. Select **File > Open**
2. Change the **Look in** folder as required
3. Click on the document to open
4. Click on **[Open]**

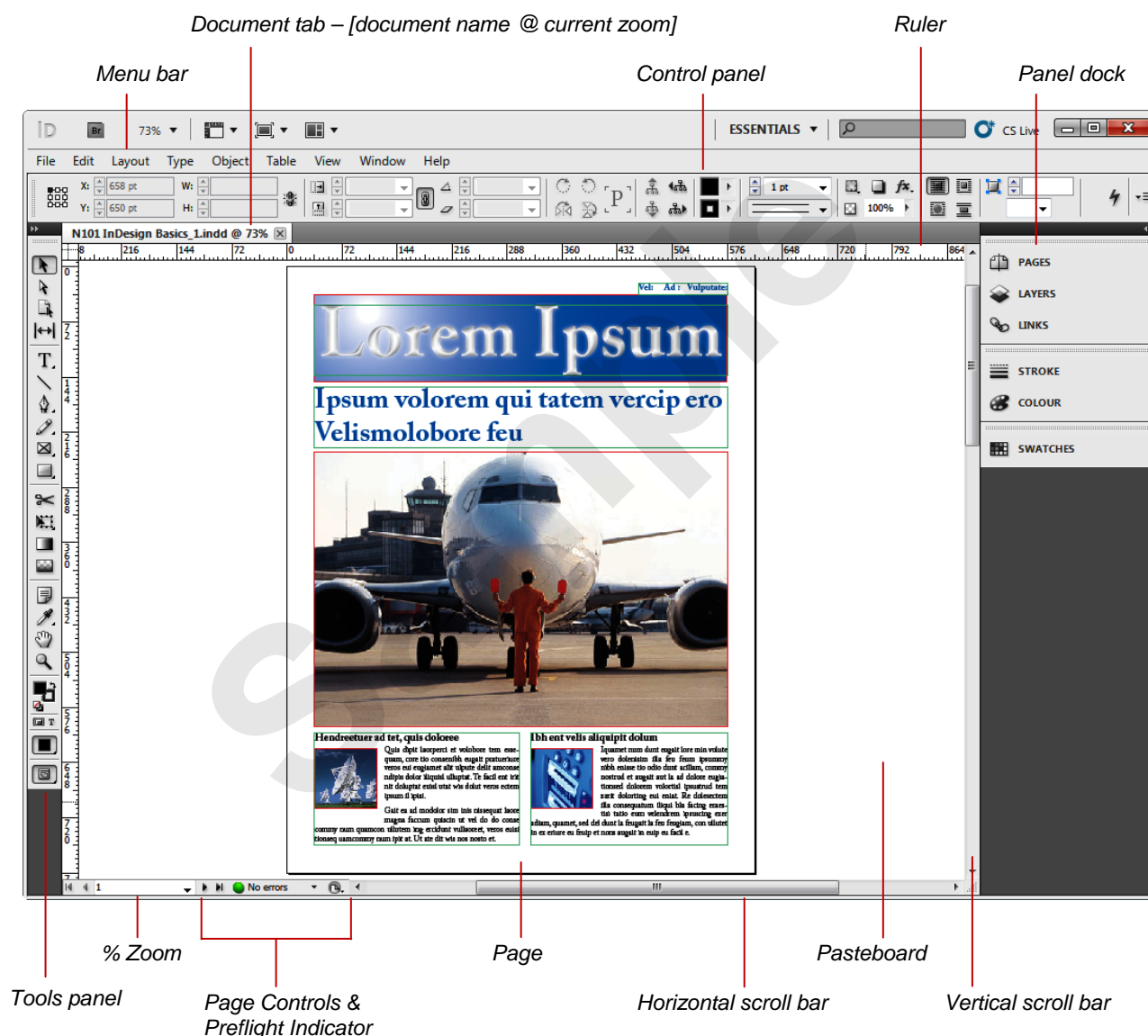
Handy to Know...

- The shortcut key to display the **Open a File** dialog box is **Ctrl + O**.

THE INDESIGN WORKSPACE

The **InDesign workspace** is where you create a document. It consists of various areas such as the page and pasteboard areas and features that make it easier for you to create a document that

employs graphic design principles – for instance, using rulers and defined panels (palettes). This page shows the features of the default Adobe InDesign CS5 workspace.




*Note: to highlight the menu commands relating to new and enhanced features in InDesign CS5, select **Window > Workspace > New in CS5**.*

UNDERSTANDING THE INDESIGN WORKSPACE

The **InDesign workspace** is made up of many features, commands and controls that can be used to create a document, and create and manipulate the contents. The table below

describes some of the features found in the **InDesign workspace** as shown on the previous page.


Feature	Description
Title bar – [document name @ current zoom]	The Title bar appears at the top of the window. It displays the name of the application, Adobe InDesign CS5, followed by the name of the document. It also shows the percentage zoom at which the document is currently being viewed. This is important because documents in InDesign can vary enormously in size, unlike word processors where the page is most often A4. The zoom percentage tells you at a glance how close the display is to 100% or actual size.
Menu bar	The Menu bar provides a series of options from which you can select commands. Above the menu bar are a series of buttons which enable you to quickly adjust the view of the workspace and/or the document, without having to locate the same options in the menu bar.
Control panel	The Control panel displays a series of controls that can be used to modify the contents and objects in a document. The controls on the Control panel vary depending on the tool currently selected in the Tools panel . For example, if the Type tool is selected, the Character Formatting Tools or the Paragraph Formatting Tools will be displayed in the Control panel.
Rulers	The horizontal and vertical rulers show the size and position of objects on the page. They can be used to create ruler guides and to help with the placement of objects.
Panel dock	The Panel dock is an area where the available panels can be stored on the screen, making them easily accessible. By default, the panel dock is displayed as titled icons, but can be expanded to display the options available in each active panel. Individual panels or groups of panels can be pulled from the dock and made to float in the document window.
Tools panel	The Tools panel holds all of the selection, drawing and control tools that you need to work with objects in your document. By default, it appears on the left side of the document window.
Pasteboard	The Pasteboard is an area outside the page on which you can place objects or text that you may want to use in the document but which you haven't yet positioned.
Zoom	The Zoom control enables you to select a specific zoom level from a drop-down list, or type in a specific zoom percentage and press <input type="button" value="Enter"/> to display the document at that zoom.
Page controls	<p>The Page controls show the page number of the currently displayed page and provide buttons to move to the next, previous, first and last spread – a spread is a collection of pages that are shown at the same time, for example, a two-page spread. You can also type a specific page number in the Page Number box and press <input type="button" value="Enter"/> to go directly to that page.</p> <p>Within the Page controls, the Error button enables you to see at a glance if there are any problems with your document. For instance, if a story is not placed entirely in a text frame, or if a graphic extends off the edge of a page, the Error button will display a red button .</p>
Page	The Page is displayed in the InDesign workspace and is the area which will appear when printed. Objects and text are placed on the page to create the document.
Horizontal scroll bar	The Horizontal scroll bar is used to move left and right across the document window to view different parts of the document.
Vertical scroll bar	The Vertical scroll bar is used to move up and down the document window to view different parts of the document.

UNDERSTANDING PANELS

Because there are so many settings in a document that you may want to access quickly, InDesign provides a vast number of panels that you can display in the document window. A

panel displays a group of related settings, such as a list of colours that you have selected for a particular document. This page discusses **panels**, how they are categorised and how they are used.

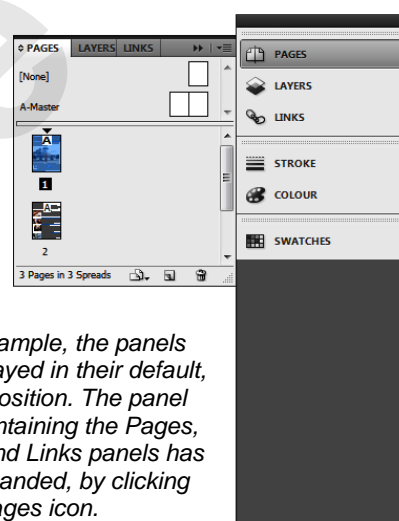
Panels

Panels (called **palettes** in Photoshop) are a collection of commands, controls, settings or options that apply to a particular aspect of a document. A panel takes the form of a window and may or may not include a menu. A menu is indicated by the menu button  which appears in the top right-hand corner of the panel.

Panel States

A panel can appear on the InDesign document window in various states. It may appear as a window or a tab, depending upon the settings chosen for each panel and how the panels appear by default. Panel states include:

Full	Also known as normal view. All commands and options are visible.
Abbreviated	Only a few rows are visible because the size of the panel has been reduced.
Collapsed	None of the commands are visible, only the title of the panel.
Floating	The panel appears as a floating window somewhere on the screen.
Docked	The panel dock appears on the right-hand side of the screen. This means that the panels are effectively attached to the side of the window. Docked panels can be displayed in full, or collapsed to icons.



In this example, the panels are displayed in their default, docked position. The panel group containing the Pages, Layers and Links panels has been expanded, by clicking on the Pages icon.

List of Panels

There are 56 panels to work with, each of which has many settings and options. Here is a list of the panels that you can choose from the **Window** menu. Some of the panels are grouped by function. For example Animation, Bookmarks and Hyperlinks are grouped as **Interactive** panels.

- | | | | |
|--|--|--|--|
| <ul style="list-style-type: none"> • Colour <ul style="list-style-type: none"> Colour Gradient Swatches • Control • Editorial <ul style="list-style-type: none"> Assignments Notes Track Changes • Extensions <ul style="list-style-type: none"> Access CS Live CS News & Resources CS Review Kuler • Info | <ul style="list-style-type: none"> • Interactive <ul style="list-style-type: none"> Animation Bookmarks Buttons Hyperlinks Media Object States Page Transitions Preview Timing • Layers • Links • Mini Bridge • Object & Layout <ul style="list-style-type: none"> Align Pathfinder Transform | <ul style="list-style-type: none"> • Output <ul style="list-style-type: none"> Attributes Flattener Preview Preflight Separations Preview Trap Presets • Pages • Stroke • Styles <ul style="list-style-type: none"> Cell Styles Character Styles Object Styles Paragraph Styles Table Styles • Text Wrap • Tools | <ul style="list-style-type: none"> • Type & Tables <ul style="list-style-type: none"> Character Conditional Text Cross-References Glyphs Index Paragraph Story Table • Utilities <ul style="list-style-type: none"> Background Tasks Data Merge Script Label Scripts Tags Tool Hints |
|--|--|--|--|

DISPLAYING AND HIDING PANELS

Given that each document you create will vary in purpose and design, the tools that you use for each will probably also vary. Therefore it makes sense to be able to **display and hide panels** as

you need them. Panels that you are likely to use frequently, such as *Swatches*, you might leave visible on the screen, but others such as *Text Wrap* would be opened only when you need them.

Try This Yourself:

Same File


Continue using the previous file with this exercise...


- 1 Select **Window > Text Wrap** to display the **Text Wrap** panel
It appears as a floating panel...

- 2 Double-click on the **Text Wrap** tab to abbreviate the panel

- 3 Double-click on the **Text Wrap** tab again to collapse the panel

- 4 Double-click on the **Text Wrap** tab again to expand the panel

You can click on  next to the tab title, for the same effect...

- 5 Click on **close**  to close the panel

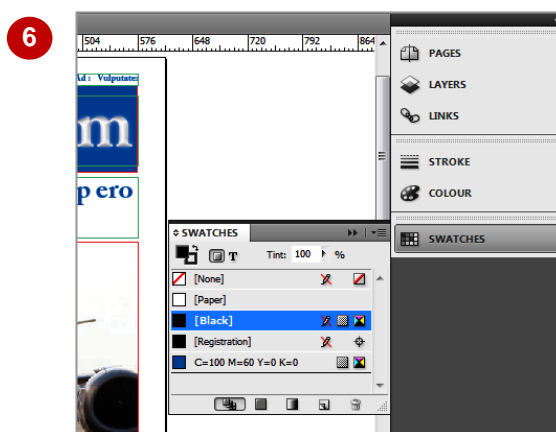
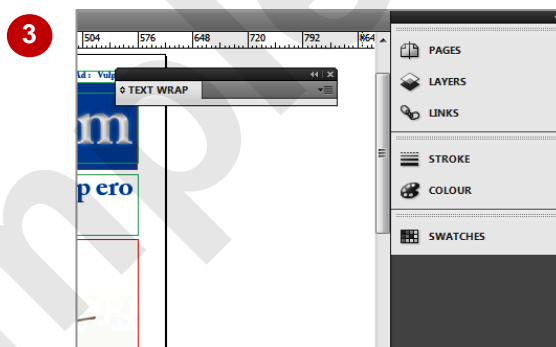
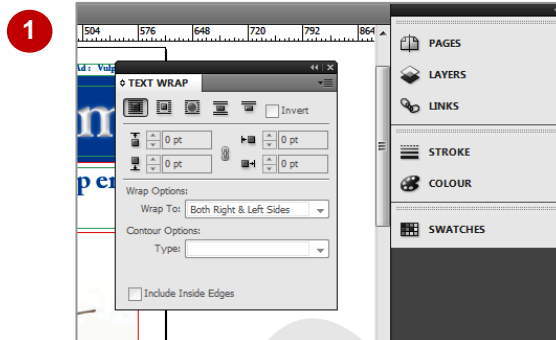
You can also dock panels...

- 6 Select **Window > Colour > Swatches**

This displays the Swatches panel which is docked on the right side of the window...

- 7 Click on **Swatches** in the panel dock to hide the panel

You can use either the Window menu or an option in the panel dock to hide and show panels



For Your Reference...

To **display** a **panel**:

1. Select **Window > [panel name]** OR click on the panel in the panel dock

To **hide** a **panel**:

1. Select **Window > [panel name]** OR click on the panel in the panel dock OR click on 

Handy to Know...

- You can use keyboard shortcuts to display and hide panels. For instance, **F5** is used to display and hide the **Swatches** panel. The keyboard shortcuts for the panels are listed next to the panel name in the **Window** menu.
- You can press **Tab** to hide/show all panels, including the **Tools** and **Control** panels.

FLOATING AND DOCKING PANELS

To give you greater flexibility in setting up your workspace, you can move panels around the screen to suit the document you are working on. For example, you may like to **float** the *Swatches*

panel over your work while you apply colour and then **dock** it back on the panel dock on the right-hand side of the screen, when you have finished.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Move the mouse pointer over **Pages** in the panel dock, then click and drag the mouse onto the screen

The panel separates from the panel group and panel dock...

- 2 Release the mouse to float the panel

- 3 Using the grey title bar area at the top of the pane, drag the **Pages** panel around the window

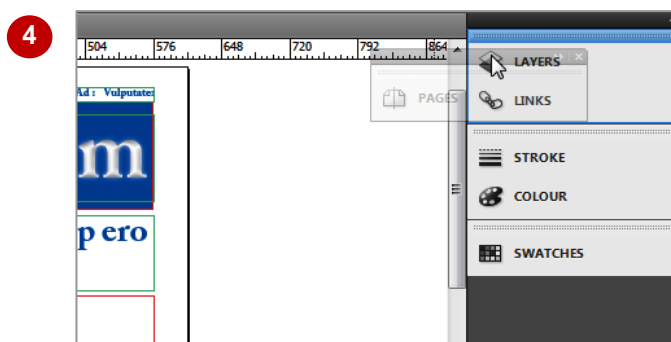
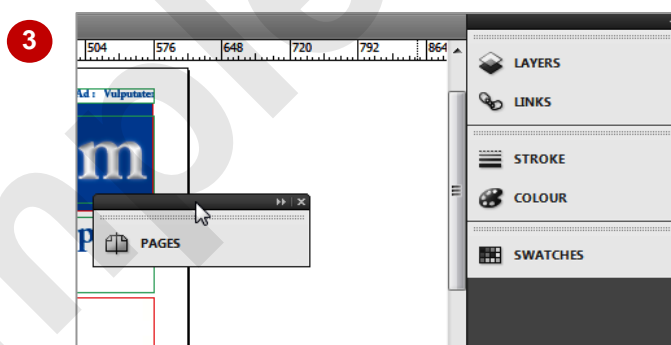
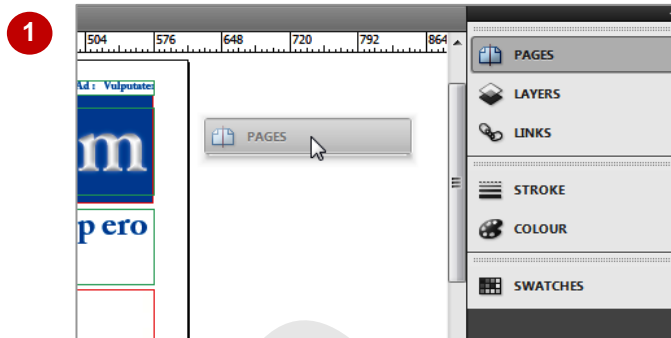
This enables you to position it anywhere on the screen...

- 4 Using the title bar at the top of the pane, drag the **Pages** panel over the **Layers** panel in the panel dock

A blue line indicates the panel position – ensure this line is not below the Info panel heading...

- 5 Release the mouse button to re-dock the **Pages** panel

It should appear regrouped with the Links panel. You can also create a new panel group by dragging a panel to the very top or bottom of the dock, or by positioning it between two panels



For Your Reference...

To **float** a **panel**:

1. Click and drag the panel heading from the dock onto the screen

To **dock** a **panel**:

1. Click and drag the panel by the tab into the panel dock

Handy to Know...

- In a floating panel group, you can move an individual panel by dragging it by the panel tab (where the panel name appears) rather than using the grey title bar area at the top of the group (this method moves the entire group).

SAVING THE WORKSPACE

The term **workspace** refers to the setup of your document window. Given that the InDesign workspace has incredible flexibility, with a huge number of panels to choose from that can be

docked or floated, rulers that can be hidden or displayed and so on, it makes sense that you can save the set up. You can create special purpose workspaces for different types of projects.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Select **Window > Workspace > New Workspace** to display the **New Workspace** dialog box

- 2 Type **My Workspace** and click on [OK]

The name of the new workspace appears at the top of the window. Now we can make changes...

- 3 Select **Window > Text Wrap** to display the **Text Wrap** panel

- 4 Select **Window > Object & Layout > Align** to display the **Align** panel

Arrange the panels neatly...

- 5 Select **Window > Workspace > Essentials** to display the original workspace

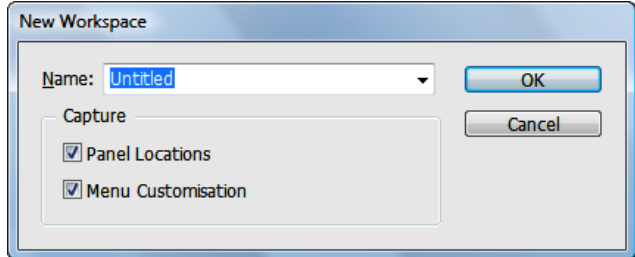
This resets all panels to their default settings...

- 6 Select **Window > Workspace > My Workspace**

Now the panels adopt the customised arrangement...

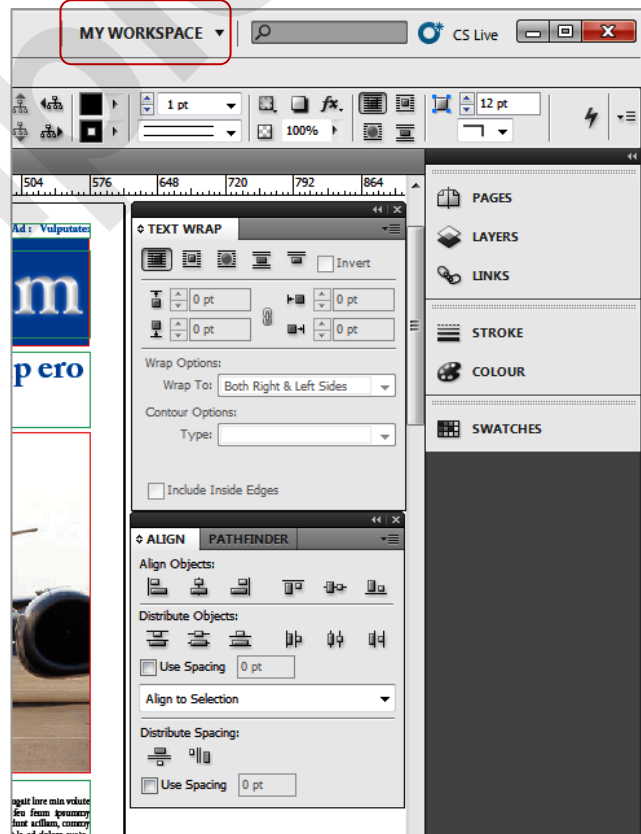
- 7 Click on the drop arrow for **Workspace** **MY WORKSPACE** and select **Essentials** to reset the panels to the default arrangement

1



You can use the **Workspace** tool to select the workspace that you want to display

6



For Your Reference...

To **save** a **customised workspace**:

1. Select **Window > Workspace > New Workspace**
2. Type a name for the workspace
3. Click on [OK]

For Your Reference...

To **display** a **customised workspace**:

1. Select **Window > Workspace > [workspace name]**

To **display** the **default workspace**:

1. Select **Window > Workspace > Essentials**

NAVIGATING A DOCUMENT

Documents can vary in size from a single page to many pages. In addition to the actual pages of a document, the document may also include master pages on which the layout and content of

the document's pages are based. To make working with documents easier, you should have a good understanding of how to get from one page to another. This is called **navigation**.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *N101 InDesign Basics_2.indd...*

1 Press **Pg Dn** to move down a screen

2 Hold down **Alt** and press **Pg Dn**

This time you move from spread to spread (two page)...

3 Select **Layout** to display the menu options

This lists navigation options as well as their shortcuts. You can also move directly to specific pages...

4 Press **Esc** then click on **Pages** in the panel dock, scroll down and double-click on the page **6** icon

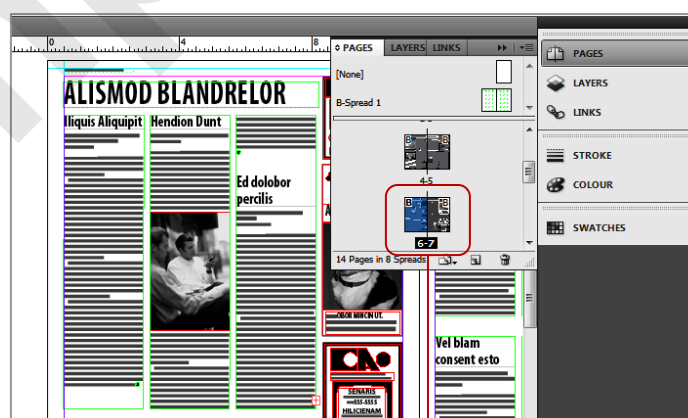
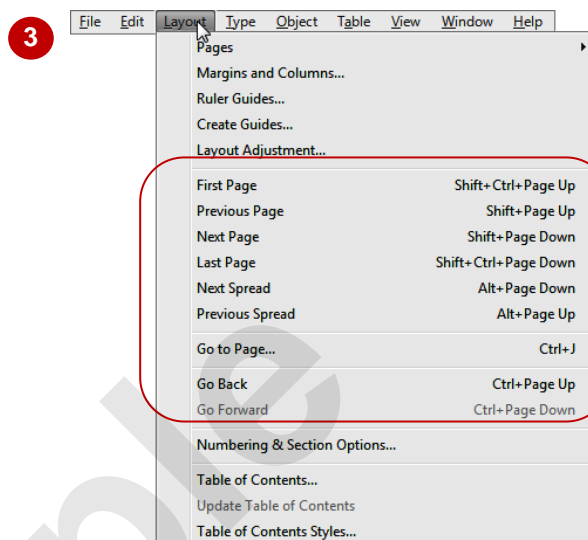
There are also navigation controls at the bottom of the InDesign window...

5 Close the **Pages** panel, then click on the drop arrow for the page number and click on **10**

6 Click on **Next Spread** to display the next double page

These buttons include Next, Last, First and Previous Spread...

7 Double-click in the page box and type **1**, then press **Enter** to go to this page



Double-click on the page icon to navigate to that page

For Your Reference...

To **navigate** a **document**:

1. Use the **Layout** menu, a keyboard shortcut, the **Pages** panel or the page navigation box at the bottom of the screen, to select or move to a page or spread.

Handy to Know...

- A spread is a set of pages viewed together. For instance, a spread might be a set of two facing pages as in a book.
- You can also rotate a page or spread, rather than twisting your head to the side! Select **View > Rotate Spread** and then select a rotation option.

Zooming A Document

Effective documents rely on the detail being just as accurate as the overall layout. **Zooming** refers to magnifying part of a document so that you can examine the details as well as being able to

zoom out so that the entire two page spread is visible on the screen. In Adobe InDesign there are several key commands that enable you to **zoom in and out** quickly to different levels of magnification.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file *N101 InDesign Basics_2.indd...*

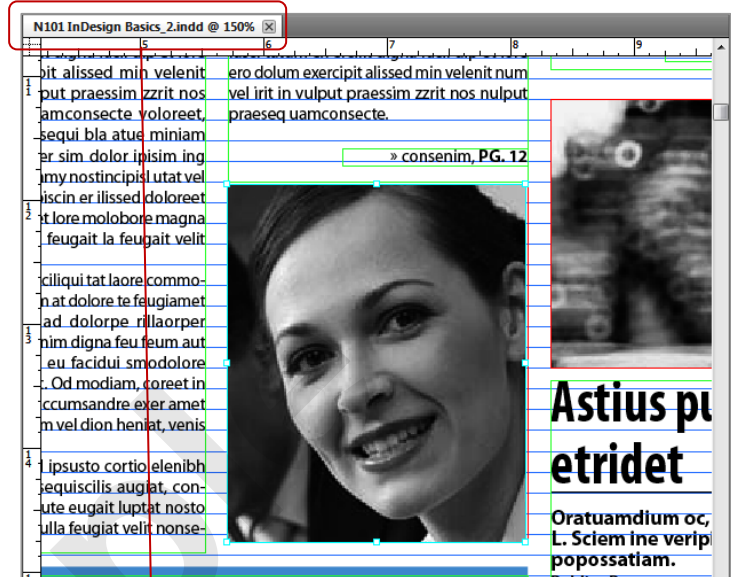
- 1 Press **Ctrl** + **0** (zero) to fit the page in the window
- 2 Press **V** to activate the **Selection** tool, then click on the picture of the woman's face to select it
- 3 Select **View > Zoom In**

Zoom In also has a shortcut key...

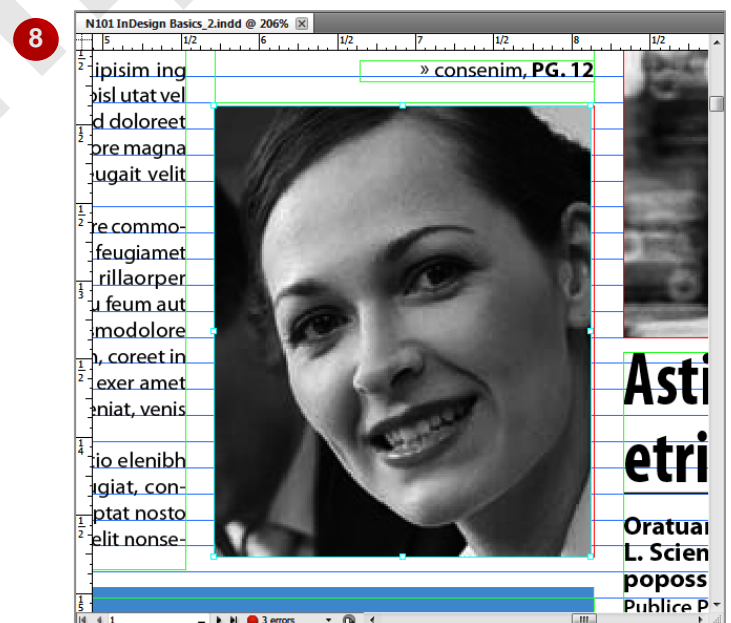
- 4 Press **Ctrl** + **=** several times, until zoom is set to **150%** – check the zoom in the document tab
- 5 Press **Ctrl** + **-** to zoom to **100%**

You can also use the Zoom tool...

- 6 Click on the drop arrow ▼ for **Zoom Level** in the **Application bar** and select **12.5%** to show several spreads
- 7 Select the value in **Zoom Level**, type **90** and press **Enter** to zoom to this magnification
- 8 Hold down **Ctrl** + **Space**, then click and drag to draw a marquee around the photo of the woman – release the mouse to zoom in to the selected area



- 4 The zoom % is shown in the document tab




- 8

For Your Reference...

To **zoom a document**:

- Select **View > Zoom In** OR press **Ctrl** + **=**
- Select **View > Zoom Out** OR press **Ctrl** + **-**
- Click in **Zoom Level**, type a specific zoom % and press **Enter** OR click on the drop arrow ▼ and select a zoom %

Handy to Know...

- Zoom to **100%** by pressing **Ctrl** + **1**.
- InDesign CS5 has a great power zoom facility. Select the **Hand** tool , then click and hold on the page to zoom out. Keep holding and move the zoom area marquee across the page. Release the mouse to resume the original zoom.

USING KEYBOARD SHORTCUTS

Keyboard shortcuts are key combinations that act as quick substitutes for menu commands or tool selections. There are many, many keyboard shortcuts in Adobe InDesign that help you select

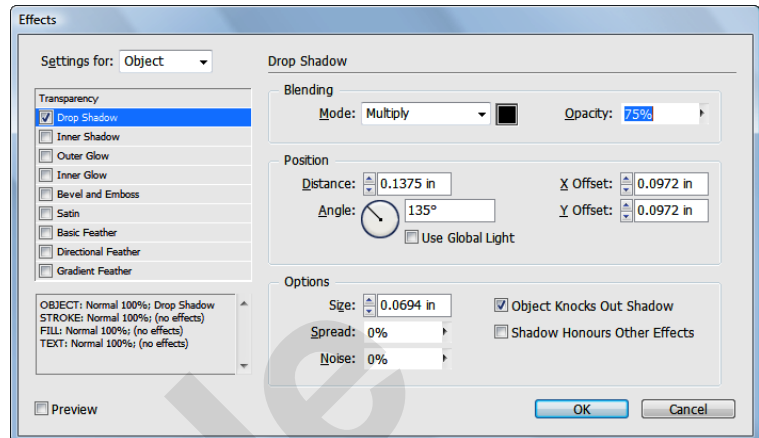
tools, move around a document, select objects in the document, reapply gradients, undo changes and so on. Many of the **keyboard shortcuts** are displayed on the menu or as tool tips.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

- 1 Ensure that the document is at **100%** zoom and that the picture of the woman's face on page 1 is selected – use the **Selection** tool
- 2 Select **Object > Effects** to display the submenu
Notice the shortcut for Drop Shadow. Let's try it out...
- 3 Click on **Object** to hide the menus, then press **Alt + Ctrl + M** to display the **Effects** dialog box
- 4 Ensure that **Drop Shadow** appears with a tick, then click on **[OK]** to apply it
- 5 Click on another part of the screen to deselect the picture and see the effect more clearly
- 6 Press **Ctrl + 0** to display the whole page in the window
- 7 Click on one of the other pictures, then hold down **Shift** and click on the remaining two pictures
- 8 Repeat steps 3 to 5 to apply a drop shadow to the selected pictures



3



5

For Your Reference...

To **use** a **keyboard shortcut**:

1. Press the key combination

To **find** a **keyboard shortcut**:

1. Display the menu command to list the keyboard shortcut combination or select **Edit > Keyboard Shortcuts**

Handy to Know...

- You can view and define keyboard shortcuts by selecting **Edit > Keyboard Shortcuts**. You can display and print a list of keyboard shortcuts by clicking on **[Show Set]**.
- As well as using keyboard shortcuts, you can make menu selections by pressing **Alt** and the underlined letter on the menu.