



Design Center Workshop

Getting Started With Adobe InDesign CS4

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InDesign Vocabulary 101

- **Image.** For the purposes of this handout, the terms picture, graphic, image, and artwork are interchangeable.
- **Link.** The connection that InDesign makes to an imported file; the link contains the file's location, and last modification date & time. A link can reference any image or text file that you have imported into a layout. InDesign can notify you when a source text or graphics file has changed, so you can choose whether to update the version in your layout.
- **Frame.** The container for an object, whether text, graphic, or color fill.
- **Package.** The collecting of all files needed to deliver a layout for printing or web posting.
- **PDF.** The Adobe Portable Document File is the standard for electronic documents. No matter what kind of computer it is viewed on (Windows, Macintosh, Unix, iPhone, et cetera), a PDF document retains high fidelity to the original in typography, graphics representation, and layout. InDesign can both place PDF files as if they were graphics and export its own pages as PDF files.
- **Place.** To import a graphic or text file.
- **Stroke.** The outline of an object (whether a graphic, line, or individual text characters) or frame.
- **Thread.** The links between text frames that route stories among them.



Using The Tools Panel

The Tools panel contains the tools for working in InDesign as well as controls for applying the colors of fills and strokes (see Screen shot 1). Some of the tools have fly-out panels that let you access the other tools in the category.

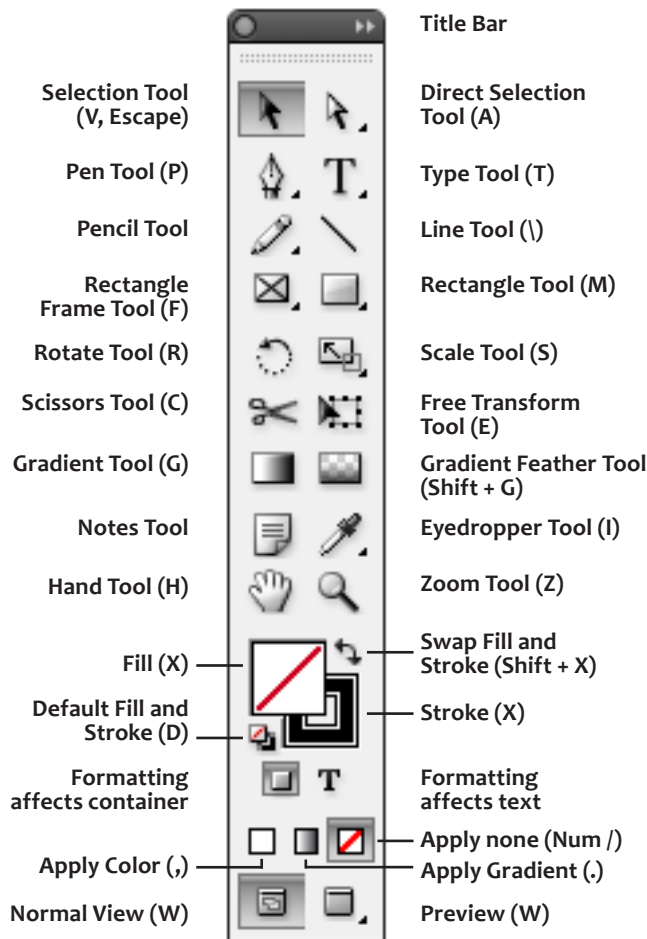
To choose a tool:

- Click the tool in the **Tools** panel.

or

Tap the individual keyboard shortcuts for each of the tools.

TIP: You can change the arrangement of the **Tools** panel from single column to double column or horizontal column using the preferences. Also, you can double-click the title bar on the **Tools** panel to change the arrangement.



Screen shot 1. The Tools panel (double column display).

Working With Panels

If you don't see a panel onscreen, you can open it by choosing the command in the **Window** menu.

To open a panel:

- Choose the name of the panel from the **Window** menu or submenu.

To close a panel:

- Click the close control in the panel's title.

You can also minimize a panel so that it only displays the panel tab (Screen shot 2).

You can also minimize a panel so that it only displays the panel tab (Screen shot 3).

To minimize a panel display:

- Click the minimize icon (Screen shot 2) to collapse the panel.

TIP: Some panels need more than one click to minimize the display completely.

To expand a panel display:

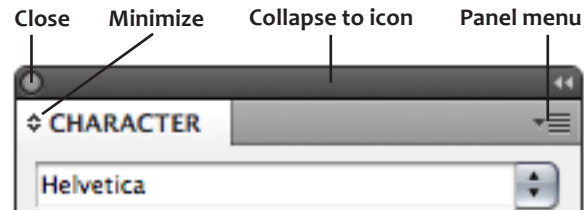
- If the panel is collapsed, click the minimize icon to expand the panel.

Panels can also be displayed in an icon view. This view takes up less screen real state.

To collapse a panel to the icon view:

- Click the top gray bar of the panel to collapse the panel to the icon view.

TIP: Click the gray bar again to expand the panel out of the icon view.



Screen shot 2. The controls for panels



Screen shot 3. A minimized panel.



Screen shot 4. A panel in the icon display.

Setting up a New Document

After you launch InDesign, you have two options: You can choose the **File > Open** (or press ⌘+O) to open a previously created document, or **File > New Document** (or press ⌘+N) to create a new document.

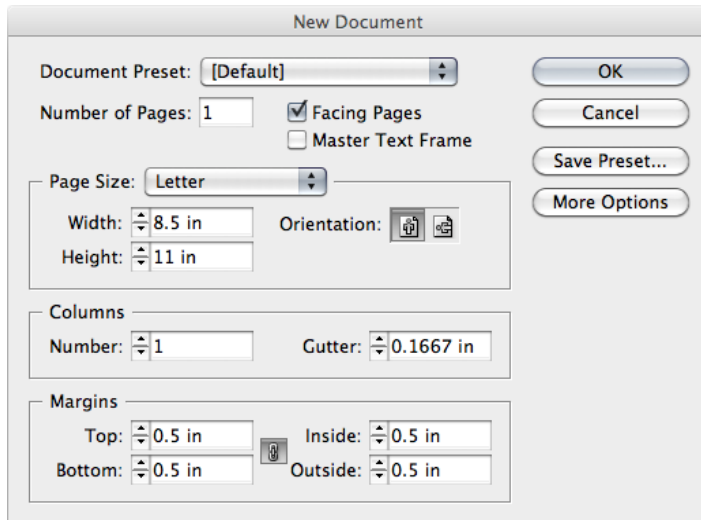
Creating a New Document

When you create a new document, you have the opportunity to set many options in the **New Document** dialog box.

To set the basic options for a new document:

1. Choose **File > New > Document** (or press ⌘+N). The **New Document** dialog box appears (Screen shot 5).
2. Type the number of pages in your document in the **Number of Pages** field. You can always add or delete pages later as needed.
3. Check **Facing Pages** to set your document with left-hand and right-hand pages.
4. Check **Master Text Frame** to make it easy to flow text onto pages.
5. Use the **Page size** pop-up list to set the size of your page.
6. Set the **Orientation** to portrait or landscape.
7. Enter the size of the margins in the **Margins** field.
8. Set the number of columns and the gutter width in the **Columns Number** field.
9. Click **OK**. The document appears in the window.

TIP: The pages are surrounded by an area called the pasteboard. Like a drawing table, you can set items there for later use. Items on the pasteboard do not print.



Screen shot 5. The **New Document** dialog box set for the basic layout options.

Opening Documents

Opening documents with InDesign is similar to opening documents with any program.

To open a file:

1. Choose **File > Open** (or press ⌘+O). The **Open a File** dialog box appears.
2. Locate and click the document on which you want to work.
3. Click **Open**.

Working With Objects

InDesign uses *objects* as the building blocks you manipulate to create finished pages. An object is a container that can (but doesn't have to) hold text or graphics, as well as attributes such as color, strokes, and gradients. When an object contains an imported image or text, or if an object is created as a placeholder for a image or text, it's referred to as a *frame*. A frame, however, has some special properties:

- ◆ If you change the size or shape of a frame that contains text, you affect the flow of text in the frame and in any subsequent frames of a multiframe story.
- ◆ If you change the size or shape of a frame that contains an imported graphic, you also change the portion of the graphic that's visible.

Creating Text Frames

InDesign holds text in objects called *frames*. Before you can start typing text, you need to create a text frame. The easiest way to do this is with the **Type** tool.

TIP: You can resize or reshape text frames like you can other objects.

To create a text frame with the **Type** tool:

1. Click the **Type** tool in the **Tools** panel.
2. Move the cursor to the page. The cursor changes to the **Type** tool cursor.
3. Drag diagonally to create the frame.
4. Release the mouse button. The text frame appears with an insertion point that indicates you can type in the frame.

Creating Graphics Frames

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

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

To create a rectangular graphics frame:

1. Click the **Rectangular Frame** tool in the **Tools** panel.
2. Drag across the page to create the rectangle.
3. Release the mouse button when the rectangle is the size you want.

TIP: Hold the **Shift** key to constrain the rectangle into a square.

Using The Zoom And Hand Tools



Use the **Zoom** tool to jump to a specific magnification and position on the page.



Use the **Hand** tool to move around within the area of the document. This is more flexible than using the scrollbars, which only go up and down or left or right and right.

Drawing Straight Lines

You can use the **Line** tool to create straight lines. Lines can serve many useful purposes in a well-designed document. For instance, they can be used to separate columns of text in a multicolumn page.

To draw a straight line:

1. Select the **Line** tool.
2. Move the crosshair pointer anywhere within the currently displayed page or on the pasteboard.
3. Click and hold the mouse button, and while holding down the mouse button, drag in any direction.

TIP: Hold down the Shift key as you drag to constrain the line to horizontal, vertical, or 45-degree diagonal.

4. Release the mouse button when the line is the length and angle you want.

Deleting an Object



1. Click the **Selection** tool.
2. Select the object you want to delete.
3. Press the **Delete** or **Backspace** key.

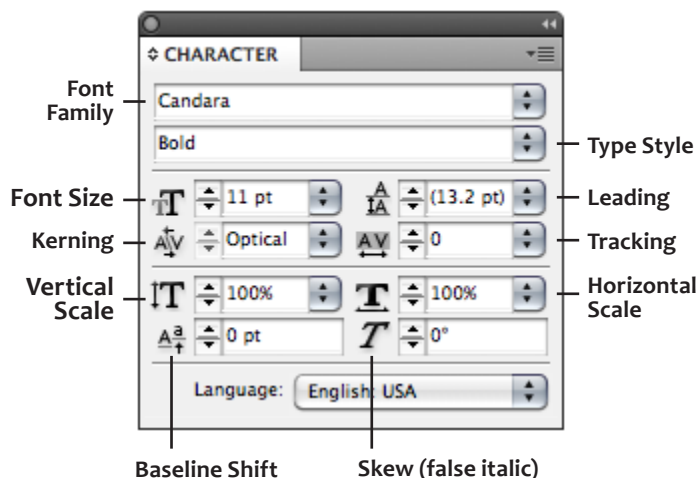
TIP: To select multiple objects, hold down the Shift key and then click each of the objects.

Working With Text

InDesign uses different tools to modify the appearance of highlighted characters or selected paragraphs. Use the controls in the **Character** panel (Screen shot 6) to change the character attributes of highlighted text. Use the **Paragraph** panel (Screen shot 7) to change the appearance of selected paragraphs.

Character-level Formatting

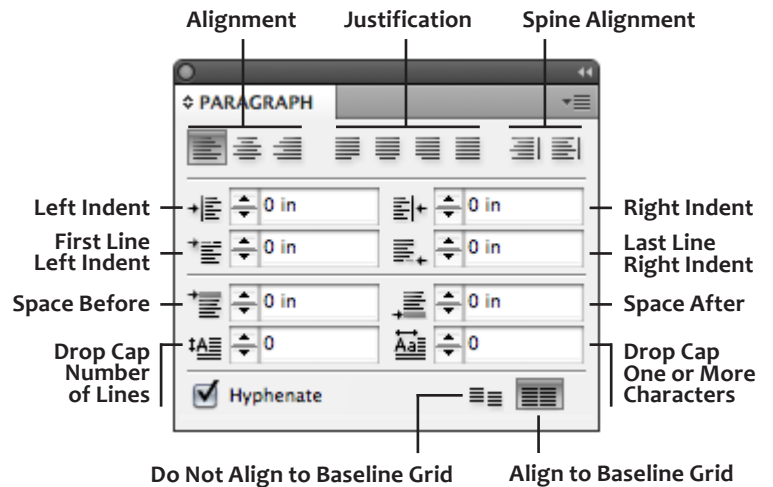
The **Character** panel provides access to most of InDesign's character-formatting options. To open the **Character** panel, choose **Window > Type & Tables > Character** (or press **⌘+T**).



Screen shot 6. The Character panel.

Paragraph-level Formatting

The Paragraph panel provides access to most of InDesign's paragraph-formatting options. To open the **Paragraph** panel, choose **Window > Type & Tables > Paragraph** (or press **⌘+T**).



Screen shot 7. The Paragraph panel.

Placing Content Into InDesign

InDesign lets you import text files saved from Microsoft Word 98 or higher. You simply save the Word **.doc** file and import that onto InDesign. If you have an earlier version of Word, you should save the text as an **.rtf** (Rich Text Format) document. RTF files retain most of their original formatting and can be imported by InDesign.

A wide variety of graphic formats can be added to InDesign documents. These formats are recommended for professional printing:

- ◆ Adobe Illustrator (ai)
- ◆ Adobe Photoshop (psd)
- ◆ Encapsulated PostScript (eps)
- ◆ Joint Photographic Experts Group (jpeg)
- ◆ Portable Document Format (pdf)
- ◆ Portable Network Graphics (png)
- ◆ PostScript (ps)
- ◆ Tagged Image File Format (tiff)

The following formats should be used only for onscreen PDF review, or for printing to non-PostScript printers:

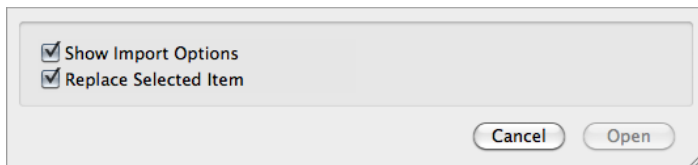
- ◆ Enhanced Metafile (emf)
- ◆ Macintosh Picture (pict)
- ◆ Graphics Interchange Format (gif)
- ◆ Windows Bitmap (bmp)
- ◆ Windows Metafile (wmf)

Placing Text

If you have a short amount of text, you can easily type it directly in InDesign's text frames (or you can copy and paste text from a word processor to an InDesign frame).

To place text files:

1. Choose **File > Place** (or press **⌘+D**). The options for placing text are at the bottom of the **Place** dialog box (Screen shot 8).
2. Locate and click the file you want to place.
3. Click **Show Import Options** to open the specific import options for that type of text file.
4. Click **Replace Selected Item** to replace the contents of a selected text frame with the new text.
5. Click **Open** to load the text into a text cursor (see the **Understanding The Loaded Cursors** box).

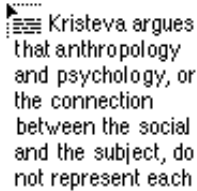


Screen shot 8. The **Import Options** appear at the bottom of the **Place** window.

Understanding The Loaded Cursors


Loaded text cursor
The **loaded text cursor** contains text that needs to be placed or overset text that needs to be threaded into a new text frame.

The loaded text cursor indicates that you can place the imported text.

Text preview



Loaded image cursor
The **loaded image cursor** appears when you prepare to place an image.

The loaded image cursor indicates that you can place the imported artwork.

Image preview


Curved loaded image cursor
The **curved loaded image cursor** appears when you position the loaded cursor over an existing frame.

The curved loaded image cursor indicates that you can place the imported artwork.

Image preview


Placing an Image

InDesign lets you import graphics files in a variety of formats (see the list in page 4). Once you have placed a graphic, you have several options for modifying its appearance.

To place an image:

1. Choose **File > Place** (or press **⌘+D**). The **Place** dialog box appears.
2. Locate and click the file you want to import.

TIP: Select the **Show Import Options** checkbox to pen the **Import Options** dialog box before you place the file.

3. Click **Open** to load the graphic into an image cursor (see the **Understanding The Loaded Cursors** box).

Once you have imported the graphic into an image cursor, there are choices as to how to add place the graphic.

To place the image at its actual size:

- ◆ Click the cursor to place the graphic in a rectangular frame the same size as the artwork.

To place the image into an existing frame:

1. Position the cursor over a frame.
2. Hold the **Opt** key to place the image into a frame that already contains an image. Curves appear around the cursor indicating you are about to place the image within the frame (see the **Understanding The Loaded Cursors** box).

TIP: When the loaded image cursor appears, you can drag to create a custom-sized frame that contains the placed image.

Wrapping Text Around an Image

InDesign lets you arrange text to flow around images and other objects (this is called text wrap).

To apply a text wrap:

1. Select the object that you want the text to wrap around. This can be an imported image, a text frame, or an unassigned frame.
2. Choose **Window > Text Wrap** (or press **⌘+D**). The **Text Wrap** panel appears (Screen shot 9).
3. Choose one of the following options for how the text should flow around the object (Table 1):

- ⇒ **No text wrap** lets the text flow across the object.
- ⇒ **Wrap around bounding box** flows the text around the bounding box for the object.
- ⇒ **Wrap around object shape** flows the text around the shape of the frame or the shape of the placed graphic.
- ⇒ **Jump object** flows the text to the next available space under the object.
- ⇒ **Jump to next column** flows the text to the next column or text frame.

| Continued on page 6 |

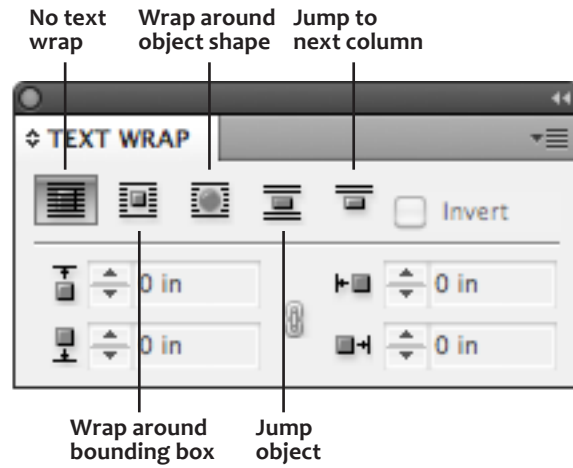
TIP: Select the **Invert** checkbox to force the text to flow inside the object.

3. Enter an amount in the offset fields to control the distance between the text and the object.

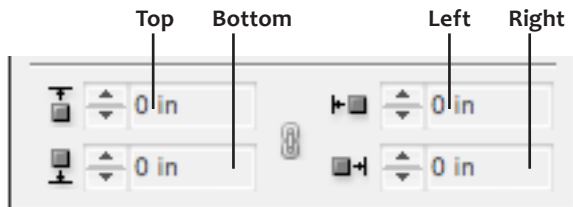
TIP: Click the **Make all settings the same** icon (chain) so that all the offsets are equal.

Wrap Chosen	Offset Available
No text wrap	No offset options available
Wrap around bounding box	Top, bottom, left, and right offset available
Wrap around object shape	Top offset option is the only one available. The amount is used as the space around the entire image
Jump object	Top, bottom, left, and right offset options available. However, only the top and bottom offsets affect the text
Jump to next column	Top, bottom, left, and right offset options available. However, only the top offset affects the text

Table 1. Description of the text flowing options.



Screen shot 9. The **Text Wrap** panel controls the settings for how text flows around an object.



Screen shot 10. Use the **text wrap offset** controls to set the distance between text and a graphic.

❖ End of Handout ❖

† Text for his handout has been excerpted/adapted/ re-written from:
Cohen, S. (2009). *InDesign CS4: Visual Quickstart Guide*. Berkeley, CA: Peachpit Press.