

STUDENT MANUAL

Adobe®
InDesign® (2020):
Part 1

Adobe® InDesign® (2020): Part 1

Adobe® InDesign® (2020): Part 1

Part Number: 092023

Course Edition: 8.0

Acknowledgements

PROJECT TEAM

<i>Author</i>	<i>Media Designer</i>	<i>Content Editor</i>
Gail Sandler	Brian Sullivan	Michelle Farney

Notices

DISCLAIMER

While Logical Operations, Inc. takes care to ensure the accuracy and quality of these materials, we cannot guarantee their accuracy, and all materials are provided without any warranty whatsoever, including, but not limited to, the implied warranties of merchantability or fitness for a particular purpose. The name used in the data files for this course is that of a fictitious company. Any resemblance to current or future companies is purely coincidental. We do not believe we have used anyone's name in creating this course, but if we have, please notify us and we will change the name in the next revision of the course. Logical Operations is an independent provider of integrated training solutions for individuals, businesses, educational institutions, and government agencies. The use of screenshots, photographs of another entity's products, or another entity's product name or service in this book is for editorial purposes only. No such use should be construed to imply sponsorship or endorsement of the book by nor any affiliation of such entity with Logical Operations. This courseware may contain links to sites on the Internet that are owned and operated by third parties (the "External Sites"). Logical Operations is not responsible for the availability of, or the content located on or through, any External Site. Please contact Logical Operations if you have any concerns regarding such links or External Sites.

TRADEMARK NOTICES

Logical Operations and the Logical Operations logo are trademarks of Logical Operations, Inc. and its affiliates.

Adobe® and InDesign® are registered trademarks of Adobe Systems Inc. in the U.S. and other countries. The other products and services discussed or described may be trademarks or registered trademarks of Adobe Systems Inc. All other product and service names used may be common law or registered trademarks of their respective proprietors.

Copyright © 2020 Logical Operations, Inc. All rights reserved. Screenshots used for illustrative purposes are the property of the software proprietor. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without express written permission of Logical Operations, 3535 Winton Place, Rochester, NY 14623, 1-800-456-4677 in the United States and Canada, 1-585-350-7000 in all other countries. Logical Operations' World Wide Web site is located at www.logicaloperations.com.

This book conveys no rights in the software or other products about which it was written; all use or licensing of such software or other products is the responsibility of the user according to terms and conditions of the owner. Do not make illegal copies of books or software. If you believe that this book, related materials, or any other Logical Operations materials are being reproduced or transmitted without permission, please call 1-800-456-4677 in the United States and Canada, 1-585-350-7000 in all other countries.

Adobe® InDesign® (2020): Part 1

Lesson 1: Getting Started with InDesign.....	1
Topic A: Identify Components of the InDesign Interface.....	2
Topic B: Customize the InDesign Interface.....	11
Topic C: Apply the Navigation Controls and Set Preferences.....	18
 Lesson 2: Designing a Document.....	 23
Topic A: Establish Project Requirements.....	24
Topic B: Apply Design Principles.....	31
Topic C: Create a New Document.....	37
Topic D: Add Text to a Document.....	42
Topic E: Add Graphics to a Document.....	52
 Lesson 3: Customizing a Document.....	 63
Topic A: Format Characters and Paragraphs.....	64
Topic B: Apply Colors, Swatches, and Gradients.....	74
Topic C: Create and Apply Styles.....	85
 Lesson 4: Working with Page Elements.....	 91
Topic A: Arrange and Align Objects.....	92
Topic B: Apply Layers.....	101

Topic C: Transform and Manipulate Objects.....	106
Topic D: Thread Text Frames.....	112
Topic E: Edit Text.....	118
 Lesson 5: Building Tables.....	 129
Topic A: Create and Modify a New Table.....	130
Topic B: Format a Table.....	137
 Lesson 6: Preparing a Document for Delivery.....	 143
Topic A: Resolve Errors in a Document.....	144
Topic B: Export Files for Printing and for the Web.....	149
 Appendix A: Mapping Course Content to Print & Digital Media Publication Using Adobe InDesign CC Exam.....	 163
 Appendix B: Productivity Enhancements.....	 165
Topic A: Additional InDesign Tools.....	166
Mastery Builders.....	169
Solutions.....	179
Glossary.....	181
Index.....	183

About This Course

Giving your documents a well-designed, professional look will put you a step ahead in the marketplace cluttered with all kinds of communications. Paragraph and character styles that allow you to format pages of text uniformly, layout features that help you to build alternate size configurations of your document, and various panels that enable you to easily customize both text and graphics; Adobe® InDesign® (2020) has all the tools you need to elevate the look of your document and get it out to the people who need to see it, whether it be in print or on the web.

This course is a great component of your preparation for the Adobe Certified Associate (ACA) Print & Digital Media Publication Using Adobe InDesign exam.

Course Description

Target Student

This course is intended for students who want to use the basic tools and features of InDesign for creating professional page layouts and designs.

Course Prerequisites

To ensure your success in this course, you should be familiar with the functions of your computer's operating system such as creating folders, launching programs, copying and pasting objects, formatting text, retrieving files, and saving files. You can obtain this level of skill and knowledge by taking one of the following Logical Operations courses:

- *Using Microsoft® Windows® 8.1*
- *Using Microsoft® Windows® 10*
- *Microsoft® Windows® 10: Transition from Windows® 7*

Course Objectives

In this course, you will use Adobe InDesign (2020) to create and deliver professional looking printed and interactive documents.

You will:

- Navigate the InDesign interface.
- Create a new document.
- Customize a document using color, swatches, gradients, and styles.
- Manage page elements.
- Add tables.
- Prepare documents for deployment.

The CHOICE Home Screen

Logon and access information for your CHOICE environment will be provided with your class experience. The CHOICE platform is your entry point to the CHOICE learning experience, of which this course manual is only one part.

On the CHOICE Home screen, you can access the CHOICE Course screens for your specific courses. Visit the CHOICE Course screen both during and after class to make use of the world of support and instructional resources that make up the CHOICE experience.

Each CHOICE Course screen will give you access to the following resources:

- **Classroom:** A link to your training provider's classroom environment.
- **eBook:** An interactive electronic version of the printed book for your course.
- **Files:** Any course files available to download.
- **Checklists:** Step-by-step procedures and general guidelines you can use as a reference during and after class.
- **Spotlights:** Brief animated videos that enhance and extend the classroom learning experience.
- **Assessment:** A course assessment for your self-assessment of the course content.
- Social media resources that enable you to collaborate with others in the learning community using professional communications sites such as LinkedIn or microblogging tools such as Twitter.

Depending on the nature of your course and the components chosen by your learning provider, the CHOICE Course screen may also include access to elements such as:

- LogicalLABS, a virtual technical environment for your course.
- Various partner resources related to the courseware.
- Related certifications or credentials.
- A link to your training provider's website.
- Notices from the CHOICE administrator.
- Newsletters and other communications from your learning provider.
- Mentoring services.

Visit your CHOICE Home screen often to connect, communicate, and extend your learning experience!

How to Use This Book

As You Learn

This book is divided into lessons and topics, covering a subject or a set of related subjects. In most cases, lessons are arranged in order of increasing proficiency.

The results-oriented topics include relevant and supporting information you need to master the content. Each topic has various types of activities designed to enable you to solidify your understanding of the informational material presented in the course. Information is provided for reference and reflection to facilitate understanding and practice.

Data files for various activities as well as other supporting files for the course are available by download from the CHOICE Course screen. In addition to sample data for the course exercises, the course files may contain media components to enhance your learning and additional reference materials for use both during and after the course.

Checklists of procedures and guidelines can be used during class and as after-class references when you're back on the job and need to refresh your understanding.

At the back of the book, you will find a glossary of the definitions of the terms and concepts used throughout the course. You will also find an index to assist in locating information within the instructional components of the book. In many electronic versions of the book, you can click links on key words in the content to move to the associated glossary definition, and on page references in

the index to move to that term in the content. To return to the previous location in the document after clicking a link, use the appropriate functionality in your PDF viewing software.

As You Review






Any method of instruction is only as effective as the time and effort you, the student, are willing to invest in it. In addition, some of the information that you learn in class may not be important to you immediately, but it may become important later. For this reason, we encourage you to spend some time reviewing the content of the course after your time in the classroom.

As a Reference

The organization and layout of this book make it an easy-to-use resource for future reference. Taking advantage of the glossary, index, and table of contents, you can use this book as a first source of definitions, background information, and summaries.

Course Icons

Watch throughout the material for the following visual cues.

<i>Icon</i>	<i>Description</i>
	A Note provides additional information, guidance, or hints about a topic or task.
	A Caution note makes you aware of places where you need to be particularly careful with your actions, settings, or decisions so that you can be sure to get the desired results of an activity or task.
	Spotlight notes show you where an associated Spotlight is particularly relevant to the content. Access Spotlights from your CHOICE Course screen.
	Checklists provide job aids you can use after class as a reference to perform skills back on the job. Access checklists from your CHOICE Course screen.
	Social notes remind you to check your CHOICE Course screen for opportunities to interact with the CHOICE community using social media.

1

Getting Started with InDesign

Lesson Time: 45 minutes

Lesson Introduction

There's a lot to discover in a design tool this robust. It's best to get familiar with the basic interface and configure Adobe® InDesign® (2020) to your needs before you dive in to creating documents.

Lesson Objectives

In this lesson, you will:

- Identify the components of the InDesign interface.
- Customize the InDesign interface.
- Use the navigation controls.

TOPIC A

Identify Components of the InDesign Interface

As with any software, it's best practice to familiarize yourself with the interface. When you know the capabilities of the application, you can take better advantage of it for your projects. You will also work more efficiently. In this topic, you'll identify the components of the InDesign interface.

Adobe InDesign is an essential tool for the creation of documents, whether they're a single page or a book. It brings together the elements you create in the other Adobe® Creative Cloud® applications and composes them into a professional-quality document.

Introduction to Adobe InDesign

The new Adobe InDesign (2020) software has been updated to include a number of new features that will help you create a more professional layout, regardless of the media you are targeting. InDesign will allow you to create page designs and typography for print, digital publishing, and tablets. This means you will be able to easily adapt your page layouts to accommodate multiple page sizes and publishing formats. And because InDesign is part of Adobe's Creative Cloud® Suite, you will be able to synch all your InDesign settings across multiple devices.

Start Workspace

When you first open InDesign, you see the **Start** workspace. From here, you can open files, create new files, access recently used files, and access tutorials about using InDesign features. The **Start** workspace is also displayed when InDesign is open, but no documents are open. You can also access the **Start** workspace when a document is open by selecting the **Home** button on the **Application** bar.

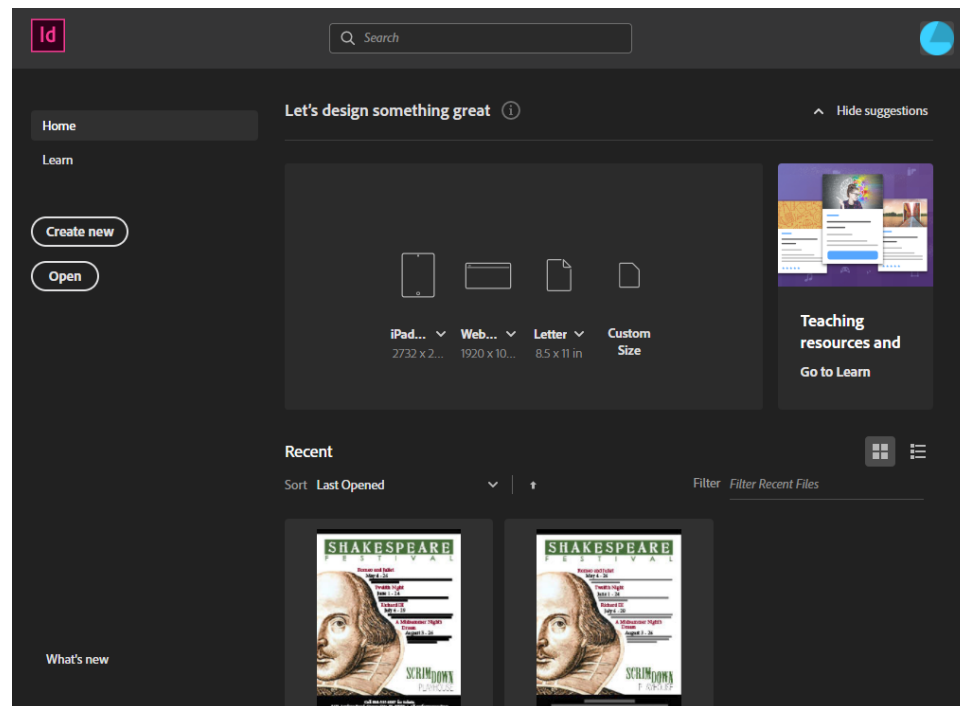


Figure 1–1: The Start workspace showing a recently opened file.

The InDesign Window

The InDesign window is the environment in which you'll work. It's made up of bars, panels, and windows that contain the tools and controls for creating your document.

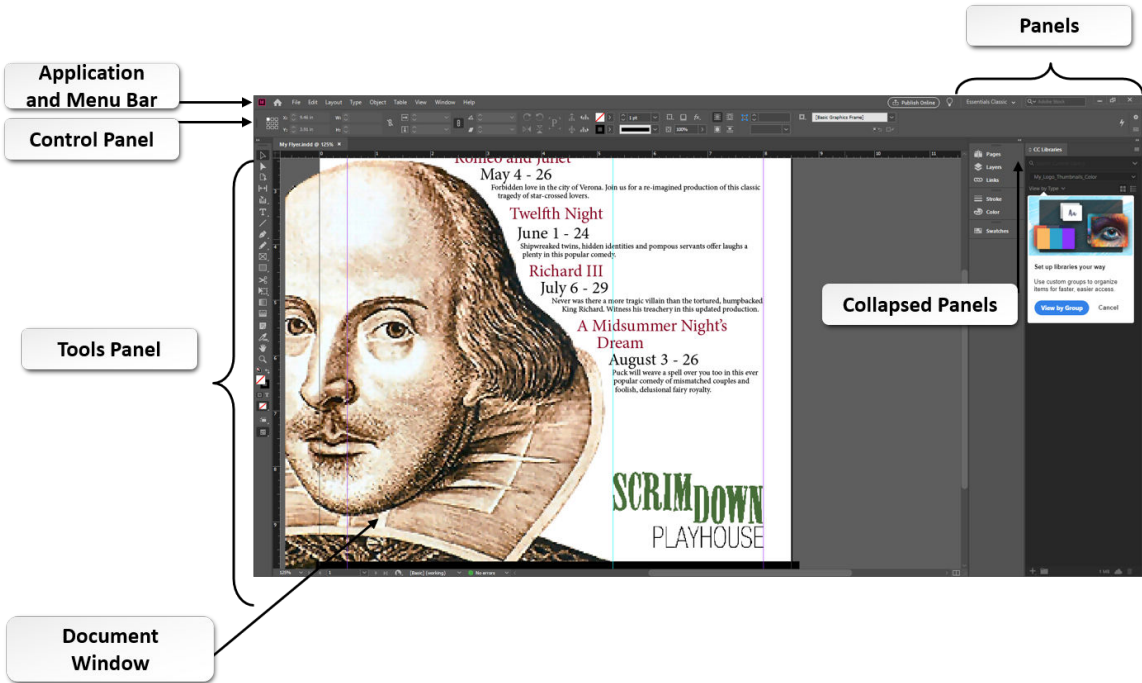



Figure 1–2: The InDesign interface.



Note: Depending on the size of your screen, the **Application** bar and **Menu** bar might appear on the same line.

Window Element	Description
Menu bar	Organizes InDesign commands under drop-down menus such as File , Edit , Layout , Type , Object , Table , View , Window , and Help .
Application bar	Contains the Go to Bridge button. Using the Search drop-down button allows you to select between Adobe Stock and Adobe Help . The Adobe Stock option links you to a website where you can browse Adobe stock photography. This bar also contains the magnification, workspace switcher, and drop-down menus for View Options , Screen Mode , and Arrange Documents .
Tools panel	Contains tools for drawing and modifying objects.
Control panel	Provides quick access to options, commands, and panels that relate to the selected object in the document window.
Panels	Allows you to perform various operations and changes based on the workspace selected in the Application bar. The panels are docked at the right edge of the application window. Selecting the Expand Panels button will expand each panel for access to related options. Two or more panels can be grouped together to form a panel group.

Window Element	Description
Document window	Displays the working area for layout creation. Open documents appear as tabs along the top of the window, making it easier for the user to move quickly back and forth between documents. These tabbed documents can also be grouped and docked. Buttons along the bottom allow you to navigate between the pages of the document. This window also displays the pasteboard, which allows you to create, add, and edit objects. Anything placed on the pasteboard will not print but will be included as part of the document.

Touch Workspace

If you have a touch screen on the computer where InDesign 2020 is installed, you might be presented with the **Touch workspace** by default. This workspace positions the tools further apart to make them easier to select with your finger. There are also fewer tools on the Tools panel. If you are using the Touch Workspace, you can use your finger, the mouse, or a stylus to make the gestures.

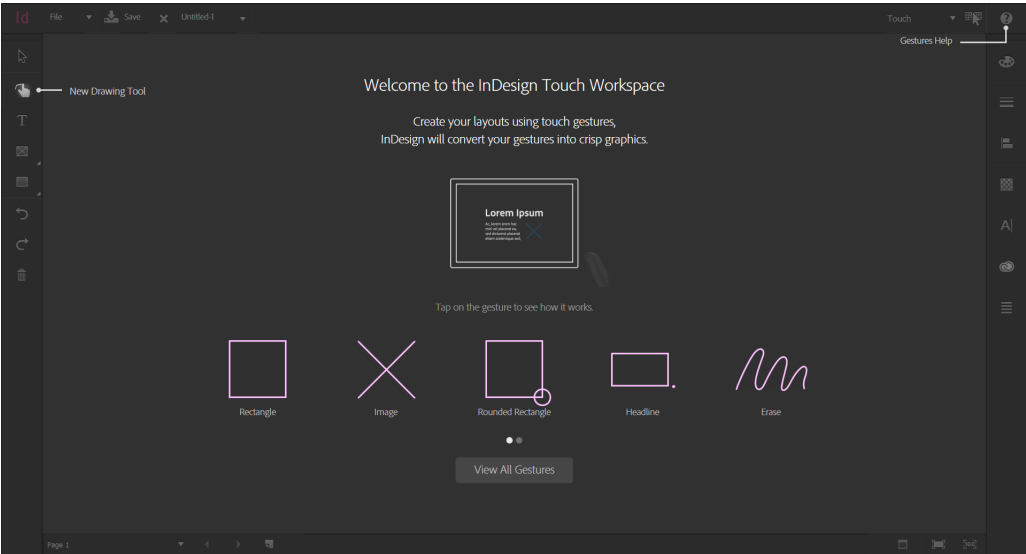


Figure 1–3: The Touch workspace gestures.

Screen Mode

You can change the visibility of the document window using the **Mode** buttons at the bottom of the toolbox or by choosing commands from the **View→Screen Mode** menu. The modes provide different ways of viewing the file in the document window.

Mode	Description
Normal	Displays artwork in a standard window with all visible grids and guides showing, non-printing objects showing, and a white pasteboard.
Preview	Displays artwork as if it were output, with all non-printing elements suppressed (grids, guides, non-printing objects), and the pasteboard set to the preview background color defined in Preferences .

<i>Mode</i>	<i>Description</i>
Bleed	Displays artwork as if it were output, with all non-printing elements suppressed (grids, guides, non-printing objects), the pasteboard set to the preview background color defined in Preferences , and any printing elements within the document's bleed area (defined in Document Setup) showing.
Slug	Displays artwork as if it were output, with all non-printing elements suppressed (grids, guides, non-printing objects), the pasteboard set to the preview background color defined in Preferences , and any printing elements within the document's slug area (defined in Document Setup) showing.
Presentation	Displays artwork as if it were a slide show presentation, with no menus, panels, or tools displayed.

The Tools Panel

The **Tools** panel contains all the tools for creating and modifying text, graphics, shapes, lines, and other graphic elements. It is organized into five sections.



Note: The keyboard equivalent for each tool is listed in parentheses. Default tools are listed at the top level bullets. Items on the second level bullets are the alternate tools available.

<i>Section</i>	<i>Includes These Tools</i>
Selection tools	<ul style="list-style-type: none"> • Selection (V or Esc) • Direct Selection (A) • Page (Shift+P) • Gap (U) • Content Collector (B) <ul style="list-style-type: none"> • Content Placer
Drawing and Type tools	<ul style="list-style-type: none"> • Type (T) <ul style="list-style-type: none"> • Type On a Path (Shift+T) • Line (\) • Pen (P) <ul style="list-style-type: none"> • Add Anchor Point (=) • Delete Anchor Point (-) • Convert Direction Point (Shift+C) • Pencil (N) <ul style="list-style-type: none"> • Smooth • Erase • Rectangle Frame (F) <ul style="list-style-type: none"> • Ellipse Frame • Polygon Frame • Rectangle (M) <ul style="list-style-type: none"> • Ellipse (L) • Polygon

Section	Includes These Tools
Transformation tools	<ul style="list-style-type: none"> • Scissors (C) • Free Transform (E) <ul style="list-style-type: none"> • Rotate (R) • Scale (S) • Shear (O) • Gradient Swatch (G) • Gradient Feather (Shift+G)
Modification and Navigation tools	<ul style="list-style-type: none"> • Note • Color Theme (Shift+I) <ul style="list-style-type: none"> • Eyedropper (I) • Measure (K) • Hand (H) • Zoom (Z)
Additional tools	Includes buttons for applying color to selected shapes and text, as well as options for previewing the document.

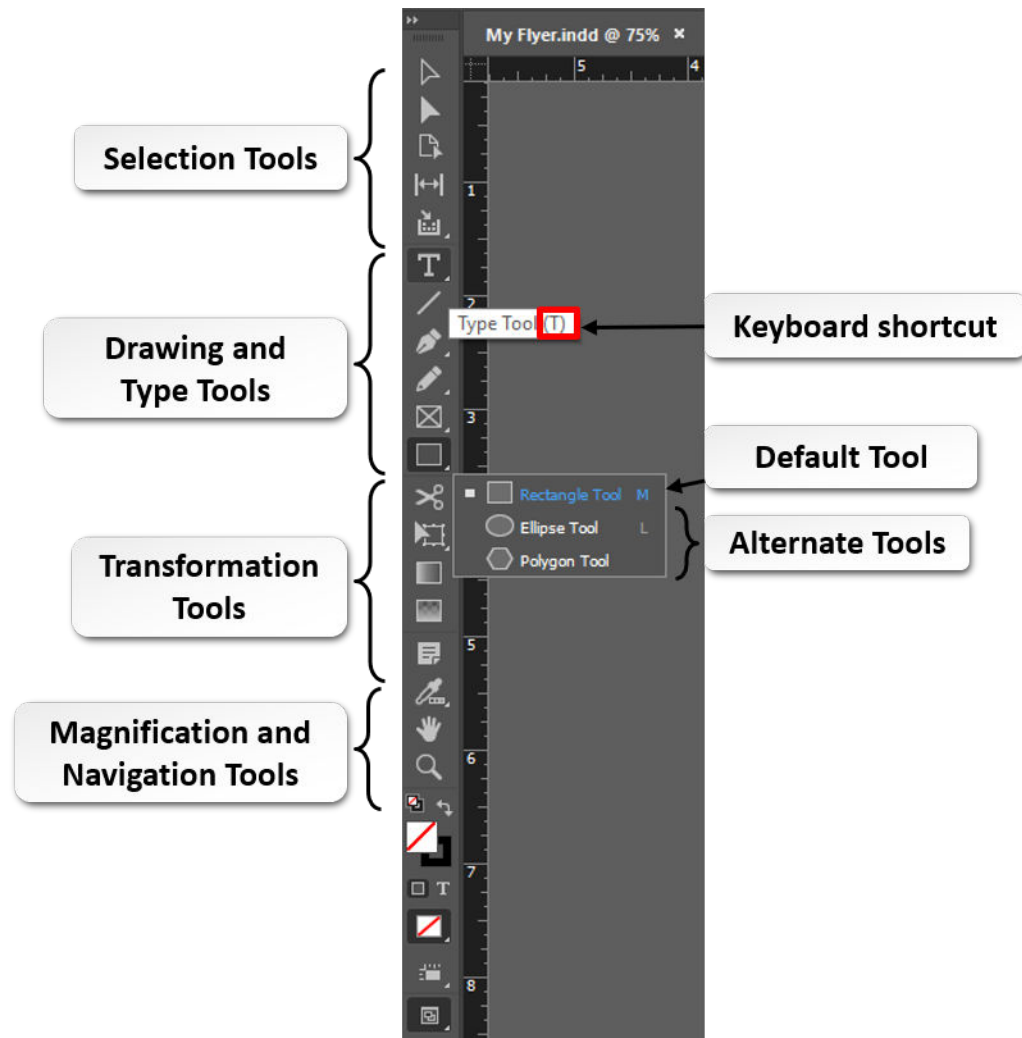


Figure 1–4: The Tools panel.

The Properties Panel

The **Properties** panel in InDesign gives you easy access to the most commonly used settings and controls. The settings that appear in this panel will change depending on your current task or the objects currently selected.

This panel is displayed by default in the **Essentials** workspace. You may notice that when you select this workspace, the **Control** panel that normally appears at the top is automatically hidden from view, since most of the settings within that panel can be found within the **Properties** panel. However, you can display the **Control** panel or the **Properties** panel regardless of your chosen workspace by selecting either of these panels from the **Window** menu.

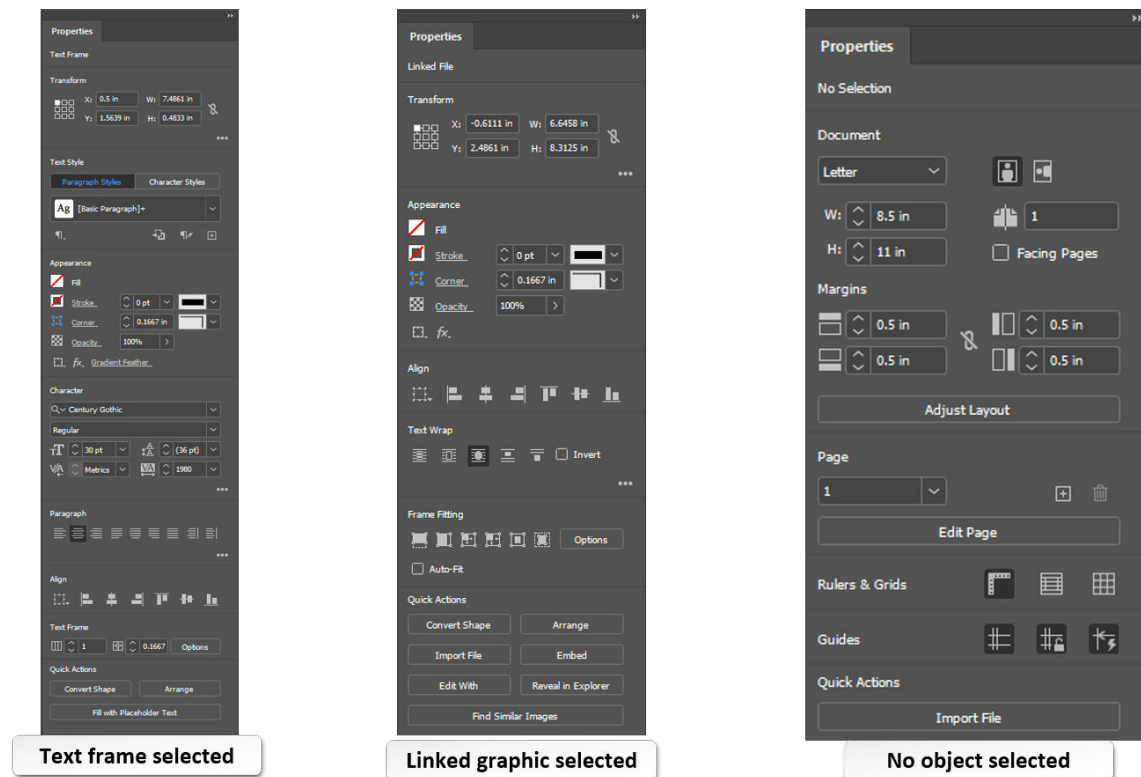


Figure 1–5: The Properties panel.

Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Change Views of the Document Window.

ACTIVITY 1–1

Identifying Components of the InDesign Interface

Data File

C:\092023Data\Getting Started with InDesign\Flyer.indd

Before You Begin

InDesign is installed, and both InDesign and your Adobe ID are activated on your computer.

Scenario

You are a designer in the publicity department of Scrimdown Playhouse. Named after the scrim, a curtain that can be both transparent and opaque, the playhouse is trying to increase its subscription base. It's mounting an ambitious festival of Shakespeare's plays and needs to create various promotional pieces to get the word out. The producers have decided to do all the marketing in-house, and as the only designer, it falls to you to learn Adobe InDesign to create flyers, posters, ads, and a playbill for the festival. Because this is your first experience with InDesign, you want to explore the InDesign environment and familiarize yourself with the interface.

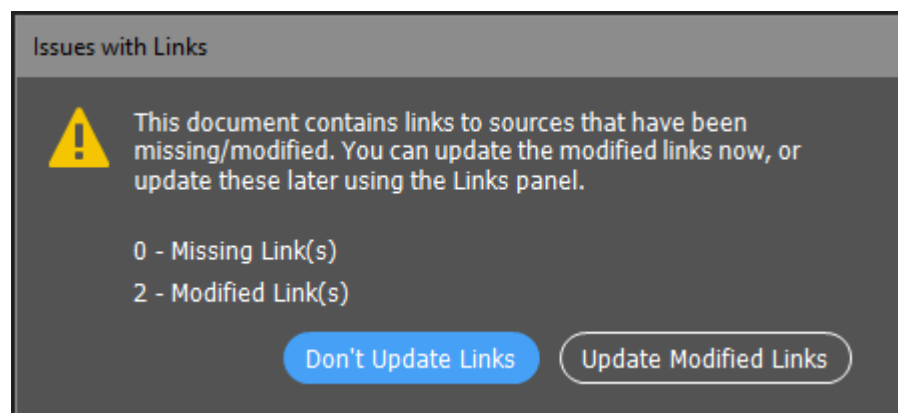


Note: Activities may vary slightly if the software vendor has issued digital updates. Your instructor will notify you of any changes.

1. Open a file in InDesign and explore the interface.

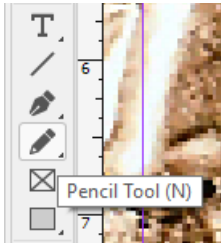
- a) Open the InDesign application.
- b) If the **Welcome to the InDesign Touch Workspace** page is displayed, select **View All Gestures**, then select **Get Started**. Close the **New Document** dialog box. Select **Exit Touch Workspace**.
- c) From the **Menu** bar, select **File→Open**, navigate to the **C:\092023Data\Getting Started with InDesign** folder, and open the **Flyer.indd** file.

If you are prompted to update links, select **Update Modified Links**.



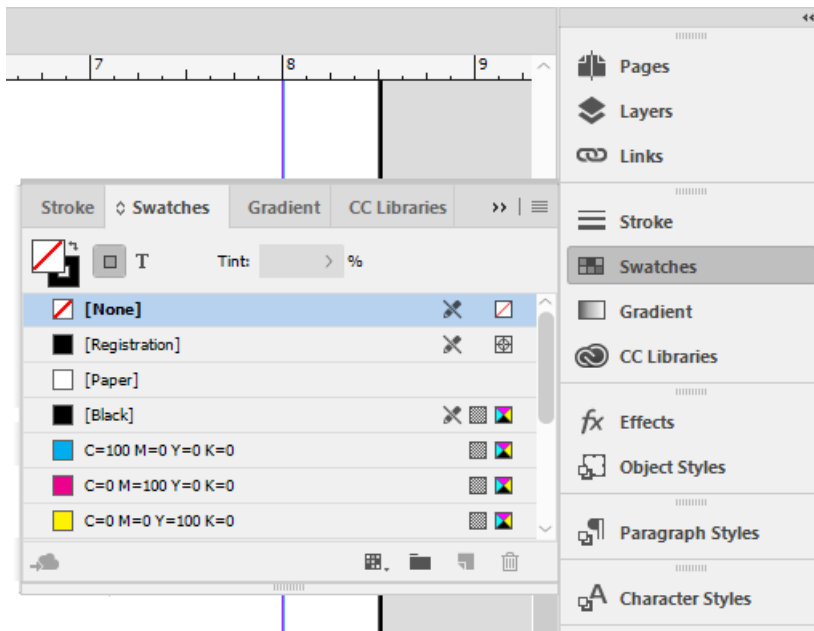
- d) In the Welcome window, select the right arrow to scroll through the tips, then select **Got It!** to close the window.

- e) If the **Learn** panel is displayed on top of the document window, drag it to the right side of the screen or close it.
- f) In the **Tools** panel, move the mouse pointer over the tools and observe the tooltips that appear.



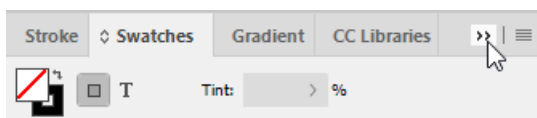
2. Change the InDesign workspace.

- a) On the **Application** bar, from the **Essentials** drop-down menu, select **Reset Essentials**. Observe the arrangement of the default panels. Notice the **Properties** panel appears on the right, and the **Control** panel above the workspace is hidden.
- b) On the **Application** bar, from the **Essentials** drop-down menu, select **Advanced**. Notice that the available panels on the right have changed, and that the **Control** panel is now displayed at the top as well.
- c) In the **Panels** section, select **Swatches**.
- d) Explore the expanded panel group by selecting the **Stroke** and **Gradient** tabs.



The **Stroke** and **Gradient** tab titles might be smaller than shown in the screenshot. You can resize the panel group by dragging the left edge of the panel group.

- e) Select the **Collapse** button to close the panel group.



- f) On the **Application** bar, from the **Advanced** drop-down menu, select **Essentials Classic**. Observe that we are opening, closing, and examining different panels to familiarize ourselves with the panels part of the InDesign interface, as well as which panels open by default in different

workspaces. The **Essentials Classic** workspace shows the **Control** panel at the top, and several panels on the right that will be used frequently throughout the course.

- g) Save the file in **C:\092023Data\Getting Started with InDesign** as ***My Flyer.indd*** and keep it open for the next activity.
-

TOPIC B

Customize the InDesign Interface

InDesign is a useful tool to many different types of users. Some may use it to create flyers, posters, and advertisements. Still others may be drawn to the ease with which it handles book production. With so many tools at your disposal, you'll find it helpful to organize your workspace so that you have the most essential panels for your project right where you need them. In this topic, you will customize the InDesign interface.

Predefined Workspaces

A **workspace** is a group of settings specifying which panels are displayed and how they appear in an environment. InDesign provides several predefined workspaces; the default is titled **Essentials**. It's possible to customize the panel location, keyboard shortcuts, and menus, and save them together as a new workspace. You may also reset, create, or delete a workspace. In case you wish to revert your workspace to a default, you can always select **Reset Essentials**. You may have to select **Essentials** first before you can reset it. Selecting **Essentials** by itself will not necessarily reset your workspace to a default. It will keep relevant changes such as position and state of your panels.

<i>Predefined Workspace</i>	<i>Displays</i>
Advanced	The panels required for working on documents that feature advanced text and graphics.
Book	The panels needed for working with large documents that will be printed as books.
Digital Publishing	The panels required for building documents that will be output as interactive presentations and animations.
Essentials	The Properties , Layers , and Libraries panels docked in place, with the control panel options shown on the Properties tab instead of below the menu bar. This is the default workspace.
Essentials Classic	The most common panels required for working on an artboard.
Interactive for PDF	The panels required for building documents that are to be exported as interactive PDFs.
Printing and Proofing	The panels required for working on documents that will be professionally printed. These panels offer the ability to proof the page design and preview color separation prior to printing.
Typography	The panels needed for working with text-intensive documents.
Touch	The panels reduced to icons along the right side of the workspace. The tools and the panel icons are widely spaced to make them easier to select. This option appears only if you are using a computer with a touch screen.

The Keyboard Shortcuts Dialog Box

As you become an experienced editor in InDesign, you will want to do everything possible to save time while doing repetitive tasks. The use of keyboard shortcuts becomes a valuable time saver, and many editors choose to customize shortcuts to their own preferences. Some shortcuts exist by default, such as **Ctrl+N** for **New Document**. Many actions, however, have no associated shortcut.

Rather than pre-defining all possible shortcuts, InDesign leaves it to the user to choose what is most natural and does not conflict with other programs. Since InDesign can be run on both a Windows and Mac machine, different shortcuts will make sense for different platforms.

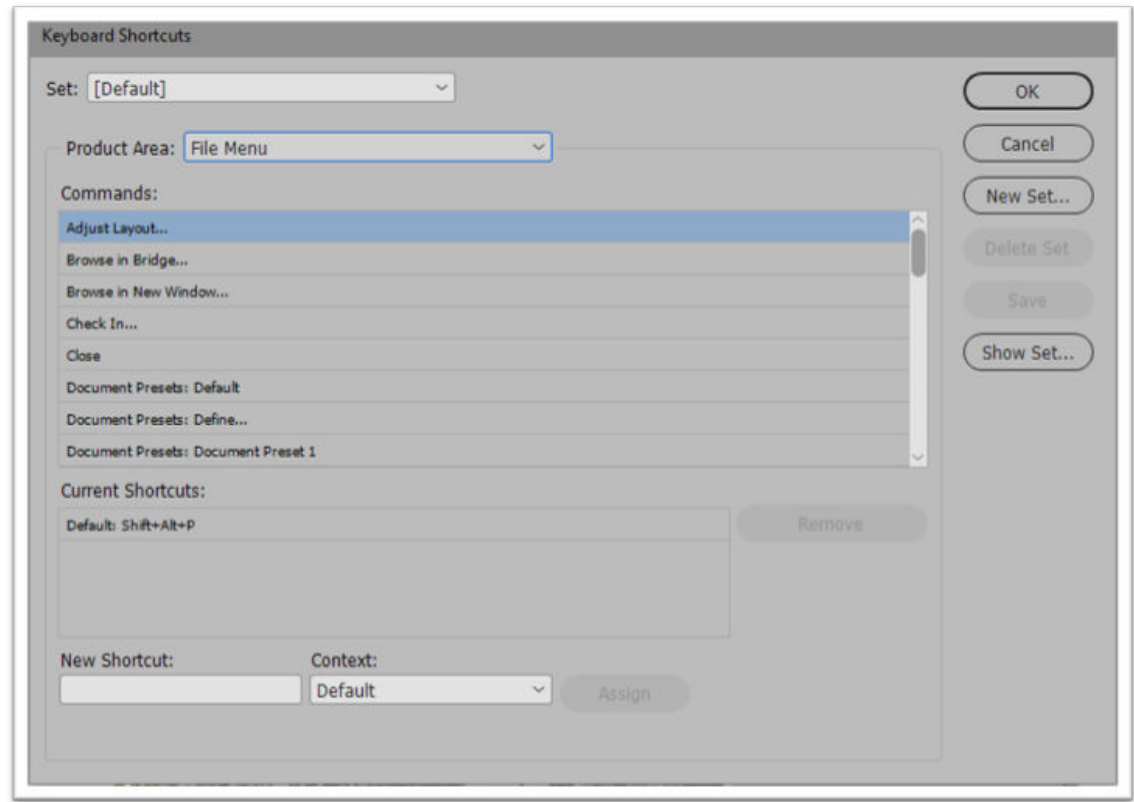


Figure 1–6: Keyboard Shortcuts dialog box.

The elements of the **Keyboard Shortcuts** dialog box (**Edit→Keyboard Shortcuts**) are used to make a shortcut set for commands in the InDesign application. Keyboard shortcuts offer a quick alternative to using the mouse to access commands as you work on a document. There are also default shortcut sets based on the ones used in QuarkXPress® 4.0 and Adobe® PageMaker® 7.0. The **Keyboard Shortcuts** dialog box has a number of components, described in the following table, that allow you to create, save, delete, or preview a shortcut set that you've created.

Component	Description
Set	A drop-down list that displays the built-in keyboard shortcuts for Adobe Illustrator, Adobe Photoshop, PageMaker 7.0, and QuarkXPress 4.0, as well as the default keyboard shortcuts for InDesign. As new shortcut sets are created, they are added as options to the drop-down list.
Product Area	A drop-down list that displays a list of all of the menus, plus Object Editing, Scripts, Structure Navigation, Text and Tables, Tools, and Navigation Views .
Commands	A section that lists the commands present on the menu or other area that is selected in the Product Area drop-down list.
Current Shortcuts	A section that displays the shortcut key for the currently selected command.
New Shortcut	A field where you may enter a new keyboard shortcut.

Component	Description
New Set	A button that opens the New Set dialog box. You may enter a name for the newly created set of shortcut keys.
Show Set	A button that opens a text file that displays the shortcut set for all the commands.
Delete Set	A button that is used to delete a customized keyboard shortcut set.
Save	A button that is used to save the changes made to a keyboard shortcut.

The Menu Customization Dialog Box

The **Menu Customization** dialog box is used to hide commands in order to simplify the user interface. You can apply colors to commands for ease of identification, or to mark preferred commands for certain work flows or tasks. The **Application**, **Context**, and **Panel** menus can be customized and included in the saved workspaces.

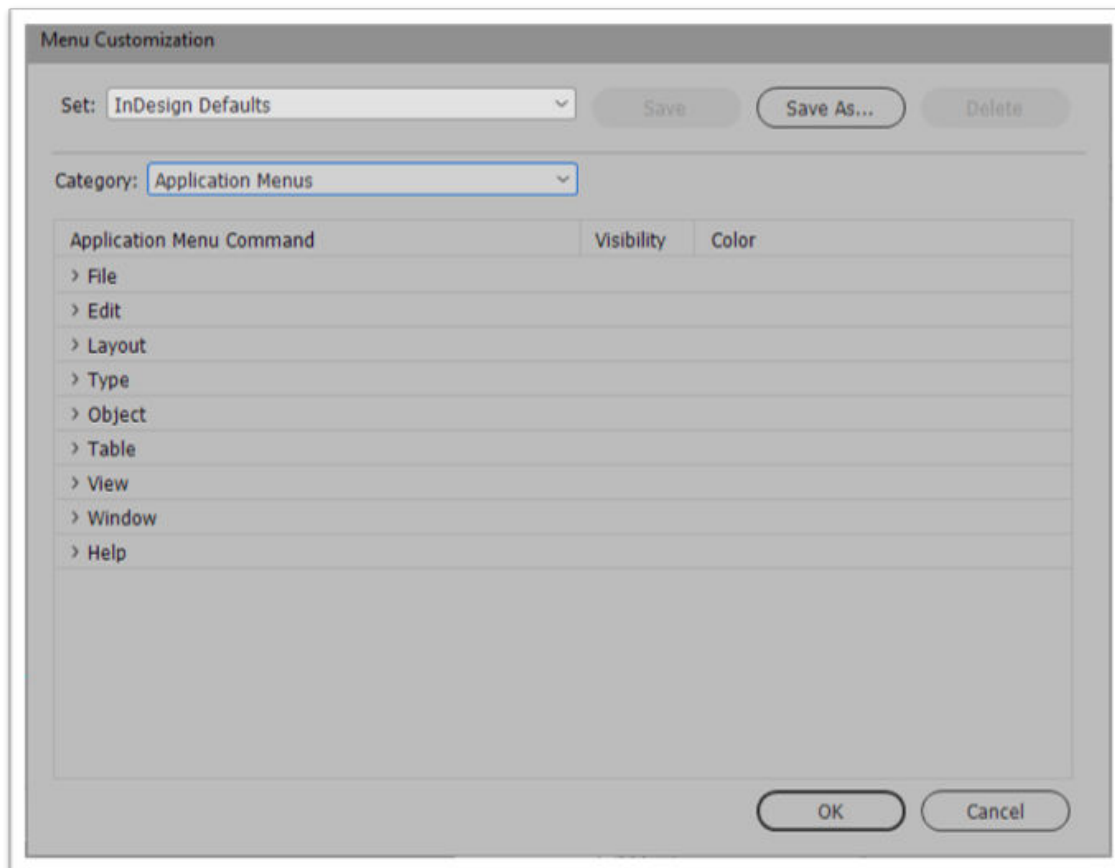


Figure 1-7: Menu Customization dialog box.

The Customize Control Panel Dialog Box

The **Customize Control Panel** dialog box is used to hide or add options in the **Control** panel in order to simplify the user interface. The **Control** panel offers quick access to options for selected objects. The dialog box consists of controls for objects, characters, paragraphs, tables, and more.

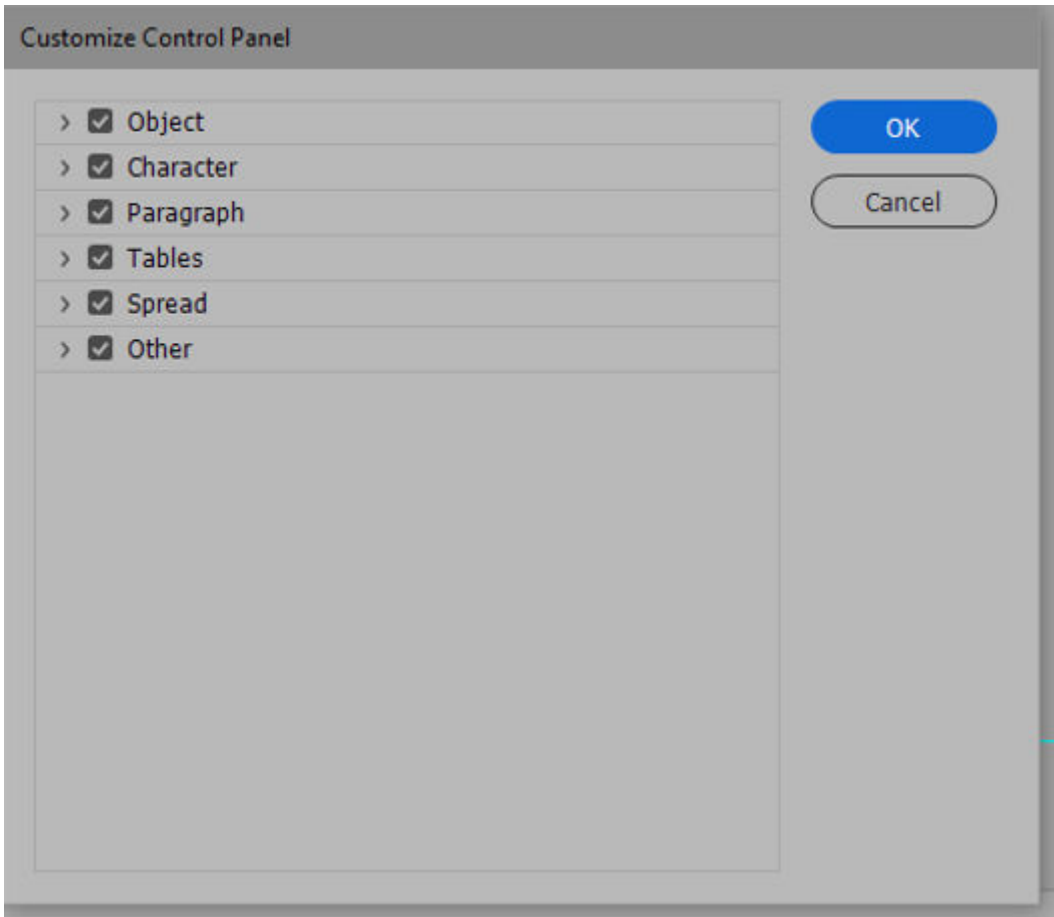


Figure 1–8: Customize Control Panel dialog box.



Access the Checklist tile on your **CHOICE** Course screen for reference information and job aids on How to Customize the Interface.

ACTIVITY 1–2

Customizing the InDesign Interface

Before You Begin

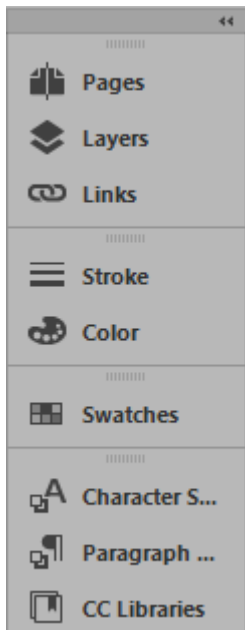
My Flyer.indd file is open.

Scenario

Now that you've familiarized yourself with the InDesign environment, you can see that many panels and options aren't necessary for your immediate needs. You decide to simplify the interface by removing unnecessary panels and hiding options that are crowding the workspace. Once you've customized the workspace to your liking, you can save it so that it's available for future use.


1. Rearrange the panels.

- On the **Applications** bar, confirm that the **Essentials Classic** workspace is currently displayed.
- On the **Menu** bar, select **Window→Styles→Character Styles** to display the **Character Styles** panel group.
- Click and drag the title bar of the **Character Styles** panel group and place it below the **Swatches** panel.



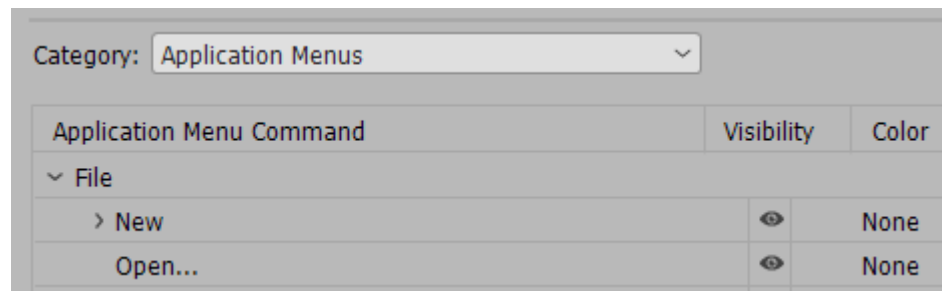
Make sure you grab the title bar of the entire group, and not just for a single panel. As you move the group, a blue line will appear in the panels area beneath the **Swatches** icon, indicating the position where it will dock.

2. Display and collapse panels.

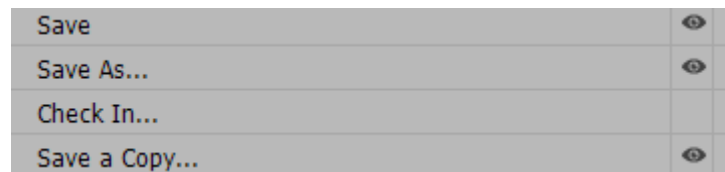
- In the dock, select **Layers** to display the **Layers** panel group.
- In the **Layers** panel group, select the **Collapse to Icons** button  to collapse the panel to its icon.

3. Customize the menu commands.

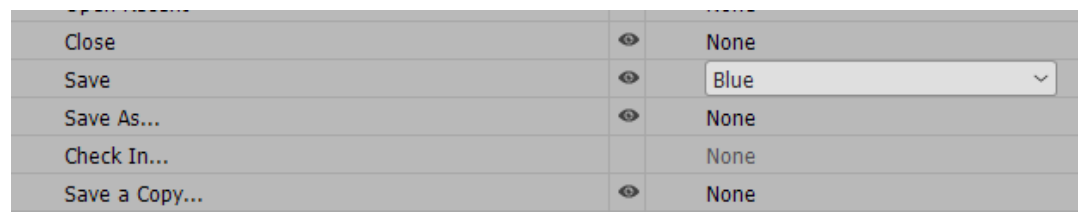
- On the **Menu** bar, select **File** to display the menu.
- On the **File** menu, verify that **Check In** is displayed. It will appear gray (inactive) in the list.
- Select **File** again to hide the menu.
- From the **Edit** menu, select **Menus**.
You may have to scroll down to see **Menus**.
- In the **Menu Customization** dialog box, in the **Category** drop-down list, verify that **Application Menus** is selected.
- In the **Application Menu Command** column, if necessary, select the arrow next to **File** to expand and view its commands.



- In the **Visibility** column, for the **Check In** command, select the **Eye** icon to hide it from the **File** menu.



- In the **Color** column, for the **Save** command, select **None** and from the drop-down list, select **Blue** to highlight the **Save** command in blue.



- Select **OK** to close the **Menu Customization** dialog box.
- On the **Menu** bar, select **File** to display the menu.
- Confirm that the **Save** command appears in blue and that the **Check In** command is now hidden.
- Select **File** again to hide the menu.

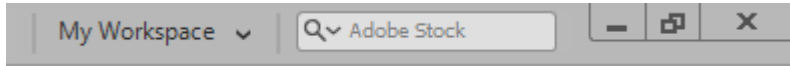
4. Change the interface color theme.

- Select **Edit→Preferences→Interface**.
- In the **Preferences** dialog box, with the **Interface** tab selected, under **Appearance**, select **Light** for the **Color Theme**.
- Select **OK**.

5. Save the custom workspace.

- Select **Window→Workspace→New Workspace**.
- In the **New Workspace** dialog box, in the **Name** box, type **My Workspace**

- c) In the **Capture** section, verify that the **Panel Locations** and **Menu Customization** check boxes are checked, and select **OK**.
- d) On the **Application** bar, verify that **My Workspace** now appears as the workspace title.



- e) Leave My Flyer.indd open for the next activity.

TOPIC C

Apply the Navigation Controls and Set Preferences

You've customized the interface to fit your needs. Now you're ready to use the navigation controls to move around easily within the document. In this topic, you will identify and use the navigation controls.

Navigation Controls

Navigation controls provide options for moving around within an InDesign document. They're located at the bottom-left part of the document window. If it's a multi-page document, then the navigation arrows, **First Page**, **Previous Page**, **Next Page**, and **Last Page** become enabled.

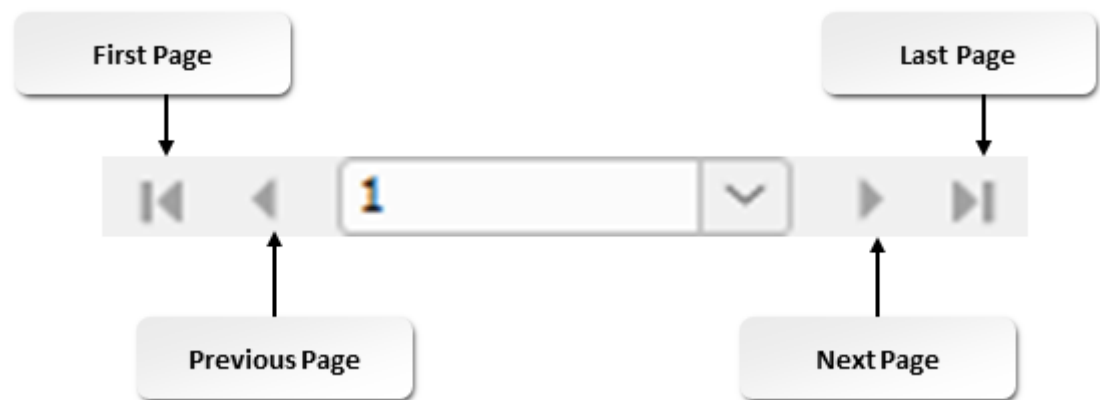



Figure 1–9: Navigation controls.

Zoom Options

There are a number of ways that InDesign allows the user to zoom in and out of a document. The

Zoom tool  on the toolbar will zoom in each time you click. Clicking while holding down the **Alt** key will zoom out. Clicking and dragging in the document window will zoom that selection to the full document window. The **Zoom Level** drop-down list on the **Status** bar allows you to select or set the zoom percentage of a document window.

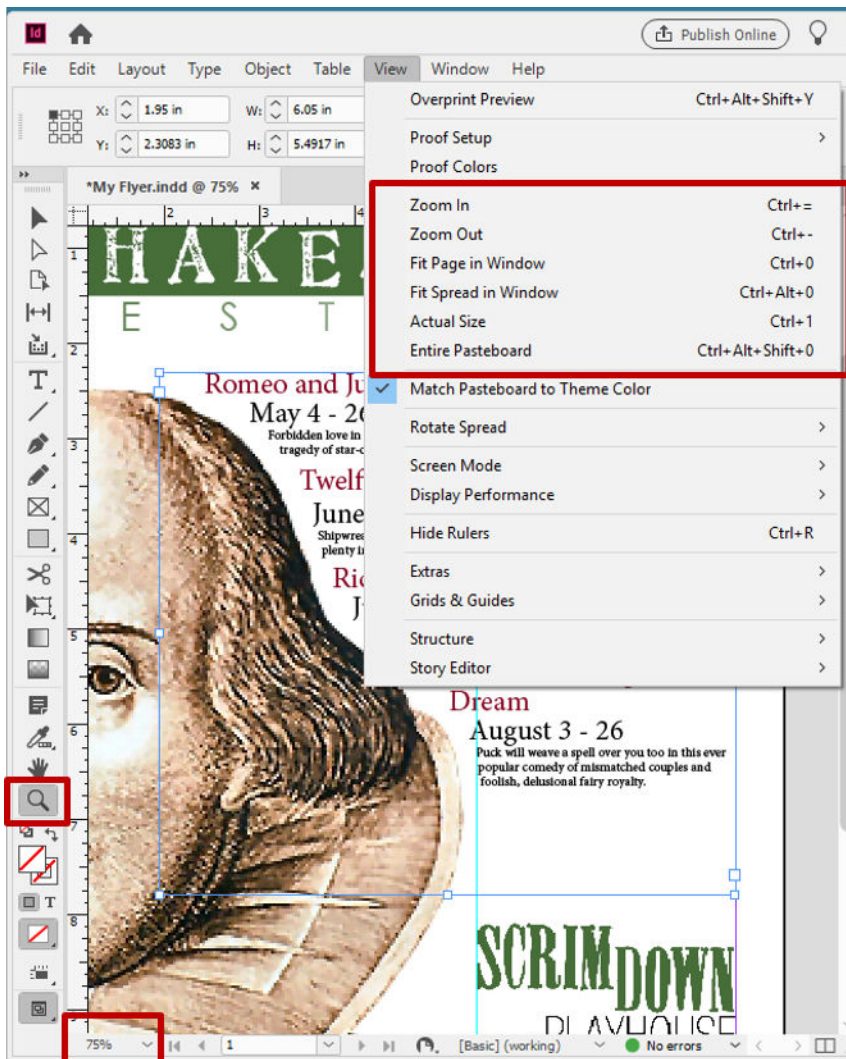



Figure 1-10: Zoom options.



Note: It's best practice to be familiar with the keyboard shortcuts for the zoom options in the **View** menu. Memorizing these can help you work more efficiently, since it's likely you will be using these quite often.

View Menu Option	Keyboard Shortcut	Allows You to:
Zoom In	Ctrl+=	Have an enlarged view of the content.
Zoom Out	Ctrl+-	Decrease the magnification of the content.
Fit Page in Window	Ctrl+0 (zero)	View a single page in the document window.
Fit Spread in Window	Ctrl+Alt+0 (zero)	View an entire spread in the document window.
Actual Size	Ctrl+1	View a page at a 100 percent zoom level.
Entire Pasteboard	Ctrl+Alt+Shift+0 (zero)	View a page and the pasteboard areas to the left and right that may hold objects not placed on the page.

Preferences

InDesign allows you to make changes to various aspects of the program to best suit your work needs. You can change items such as:

- Color theme
- Ruler, stroke, and point settings
- Baseline and document grids
- Spelling and autocorrect settings

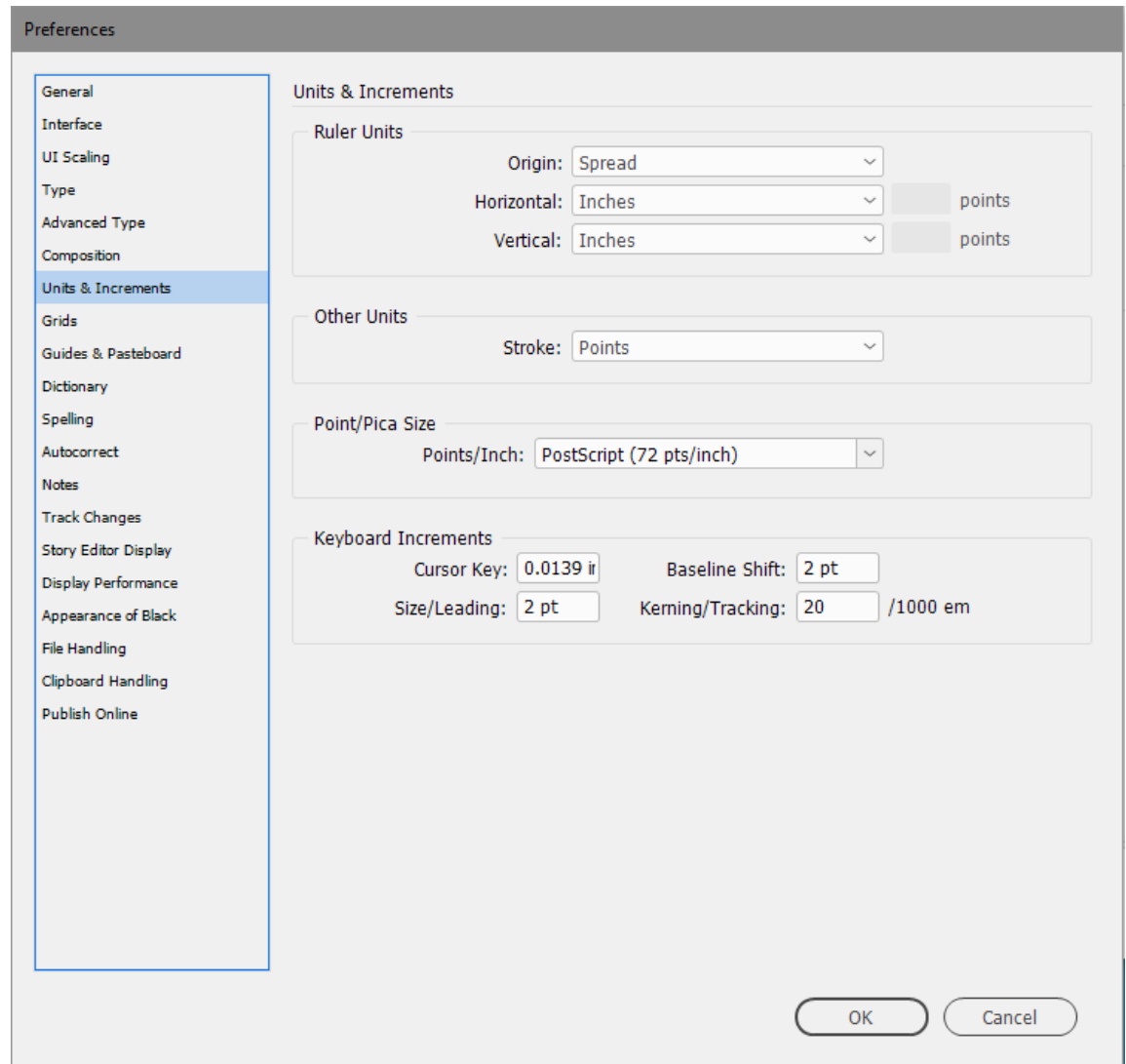


Figure 1–11: The Units & Increments settings in the Preferences dialog box.



Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Apply Navigation Controls and Set Preferences.

ACTIVITY 1–3

Using the Navigation Controls


Before You Begin

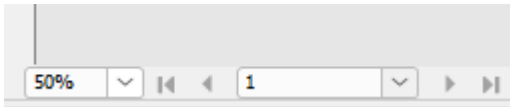
My Flyer.indd is open.

Scenario

As you work on your document, you find it necessary to focus in greater detail on some objects and to zoom out to view the document as a whole. Before continuing, you decide to become more familiar with the capabilities of the zoom and navigation tools.

1. Magnify the text in the image box by using the **Zoom** tool.

- Verify that the view is 100 percent by using the **Zoom level** drop-down list. If necessary, select the drop-down arrow and then select 100%.
- In the **Tools** panel, select the **Zoom** tool. 
- Verify that the mouse pointer changes to a magnifying glass with a plus sign when the mouse pointer hovers over the document window.
- Select the text in the black box at the bottom of the flyer twice to view the text magnified.
- Hold down the **Alt** key and verify that the magnifying glass now has a minus sign, indicating that the **Zoom Out** tool is enabled.
- Select the page several times. Verify that the page has zoomed back out and the page view is smaller.
- On the **Status** bar, from the **Zoom Level** drop-down list, observe the current zoom percentage, then if necessary, change it to **50%**.



- On the **Status** bar, from the **Zoom Level** drop-down list, select the zoom level, type **80** and then press **Enter**. The image is now larger.

2. Magnify a specific region in the document.


- From the **Menu** bar, select **View→Fit Page In Window**.
- Confirm that the page fits in the document window.
- In the document window, drag a marquee (selection) around the text "Romeo and Juliet."



Note: The term marquee means an area completely surrounding specified items. It comes from the idea of a physical marquee, or sign, over a theater that displays the name of the current production and its stars.

- Verify that the area is magnified and the text can now be viewed closely.

3. Navigate within the image by using the **Hand** tool.

- In the **Tools** panel, select the **Hand** tool. 
- Using the **Hand** tool, click and drag upward to view the remaining text below.
- Select **File→Close** to close the file. If prompted to save changes, select **No**.

Summary

In this lesson, you familiarized yourself with the components of the Adobe InDesign interface and customized it to suit your needs and increase efficiency. You also learned the tools for navigating within your document and you set preferences to maintain consistency across documents. These features of InDesign will continually aid you in your work flow and help you build professional-looking documents with ease. Now that you're comfortable with the interface, you can begin building a new document.

What element of the interface do you feel will be most important in your work flow?

What Preferences setting do you see as being essential to your work flow?



Note: Check your CHOICE Course screen for opportunities to interact with your classmates, peers, and the larger CHOICE online community about the topics covered in this course or other topics you are interested in. From the Course screen you can also access available resources for a more continuous learning experience.

2

Designing a Document

Lesson Time: 1 hour, 30 minutes

Lesson Introduction

The tools are in front of you. It's time to start building a document and adding text and graphics. In this lesson, you will design a document.

You will start with some preliminary settings, such as page structure and layout. Next, you'll enter text or import it from another source. Finally, you will place graphics and make adjustments to the flow of text around them.

Lesson Objectives

In this lesson, you will:

- Establish project requirements and documentation.
- Apply design principles in Adobe InDesign.
- Create a new document.
- Add text to a document.
- Add graphics to a document.

TOPIC A

Establish Project Requirements

When creating page layouts with Adobe® InDesign® (2020), you will need to have a solid understanding of the purpose and audience for rich media content. You will need to identify project requirements, client goals, audience needs, and common problems that arise throughout the project development cycles.

You will also need to be familiar with the term intellectual property. Copyright law, developed to protect intellectual property, was enacted to enable our society to progress. Because you create original work when you build web pages and you might use graphics, illustrations, and text created by others in building those pages, you are on both sides of the copyright law. As a web page creator, you seek both protection for your intellectual property and fair and legal use of the intellectual property of others.

Finally, you will need to have a solid understanding of project tasks and common problems that arise throughout the project development cycle.

In this topic, you will learn how to identify client requirements and project goals, and examine project documentation to see how the project requirements documents compare to the finished project.

Identify the Audience

When determining the purpose of the content, it is necessary to consider the client's goals for the project, and identify how the rich media content can best fulfill those goals. Is the purpose to educate, entertain, or inform? What types of media, functionality, and interactivity will be needed?

In identifying how the rich media content should be communicated, it's important to consider the demographics of the target audience. Key demographics generally include age group, gender, computer literacy, education, income level, and geographical location. How relevant the demographics will be to a project will vary from project to project.

What does your audience expect to gain from the experience, and how can you best meet their needs? Consider usability, accessibility, engagement, and what technology the audience will be using to determine how audience needs can best be met.

Copyright Rules

A copyright is protection of a specific and tangible expression of an idea. It does not protect the idea. That expression can take the form of a novel, song, design, movie, website, and so on. A trademark is similar but it protects a design, image, slogan, symbol, or word that identifies goods or services. The copyright owner obtains the copyright at the moment of realization or completion of the tangible result from the idea.

One limitation to the copyright law is for fair use. Fair use allows limited use of a copyright-protected work. What is allowable is determined by the following factors:

- The purpose of the use.
- The nature of the copyright-protected work.
- How much is to be copied.
- The effect on the market or value of the work.

Fair use is determined on a case-by-case basis. It is in common use for commentary, criticism, library archiving, news reporting, research, scholarship, and teaching.

If you will be using text or graphics owned by others, you should properly cite the origin of the information. This should be done whether the copyright symbol or notice is present in the original or not.

If you suspect a work is copyrighted, seek out the owner and request permission to use all or part of the work. Many websites have sufficient contact information. If you believe the copyright is recorded at the U.S. Copyright Office, and it was recorded after 1978, then you can research the owner online at www.copyright.gov. Copyrights recorded before 1978 can be researched by their staff for a fee.

The primary way to identify copyrighted material is by checking for a copyright notice. However, you can no longer depend on this notice being present. The use of a copyright notice was once required as a condition of copyright protection, but it is now optional. The notice does not register the copyright with the U.S. Copyright Office. If you wish to register a copyright you must do it through that office.

It is a good idea to put a copyright notice on your website so visitors are reminded that your site is protected by copyright. The general form of the notice is "**Copyright 2018 The Emerald Epicure Ltd. All Rights Reserved.**" The copyright symbol © may be substituted for the word "Copyright."

Project Management

Project management always struggles with the classic iron triangle. That is, you must balance the opposing requirements of making something good, cheap, and fast. You can generally have two of those (such as good and cheap, cheap and fast, or good and fast), but you cannot easily have all three at the same time. Good project management requires maintaining a balancing act between the three.

The first thing you can do to manage the iron triangle is to create a project plan. The objective of a project plan is to identify the approach that the project team will use to produce and deliver the scope of the project. A well-planned project ensures that the project meets specific objectives within the given time frame, and helps streamline the development process. At minimum, the project plan answers these four questions:

- Why is there a need for the project?
- What is the work that will be performed?
- Who will be involved and what will their responsibilities be?
- When will the project be delivered?

The complexity of a project plan will depend on the project itself, its scope, and requirements. A small project might have only a minimal plan, whereas a large project might be laid out in a complex and lengthy document. Whether the project and its plan are simple or complex, the same considerations apply, scaled up or down as appropriate.

According to the Project Management Institute, a well-executed project plan addresses the following areas.

<i>Component</i>	<i>Description</i>
Overview	Why the project exists and its primary objectives.
Scope	A description of what the project encompasses, its vision, and the features required to meet stakeholders' needs.
Requirements	A description of the features that the end product should have.
Schedule	The project's schedule, including start and finish dates, milestones, activities, and deliverables.
Finances	The allocation of funds, assets, and liabilities over the project's lifetime.

Component	Description
Quality	The quality assurance and control processes to achieve consistent quality.
Resources	The deployment of an organization's resources as needed by the project. May include financial, inventory, production resources, IT resources, and internal and contract labor.
Stakeholder Management	The categorization of the project's stakeholders in order to determine the level to which they must be kept engaged or informed during the project's progress.
Communications	The communications plan that includes what and how to communicate with the various stakeholders, including the frequency and format for each type of stakeholder.
Change Management	The process wherein changes to the scope of a project are formally introduced and approved.
Risk Management	The identification of risks to the project, a projection of their potential impact (in dollar amounts or relative ranking), and a plan to mitigate those risks.
Procurement	The process of purchasing goods and services necessary to fulfill the objectives of the project.



Note: While you are not expected to master all aspects of project management in an Adobe InDesign class, you should be aware of the various project management components at a high level. These components will impact, either directly or indirectly, every stage of the design and production process.

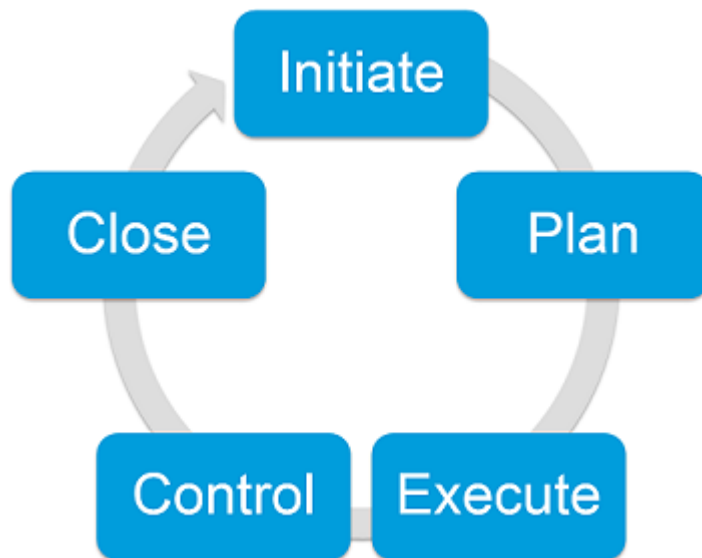


Figure 2–1: The project lifecycle.

Initiate

During the initiating phase, the project is sponsored and defined. The deliverable for the initiating phase is the scope document, which specifies the breadth of the project. It details exactly what will be delivered, as well as what will not be delivered. For internal projects, it is often written by the project sponsor; and for external projects, the scope is agreed to by the customer and internal sponsor. It does not include cost estimates or timelines, as these items are covered separately.

Plan

Good planning in the beginning stages of a project keeps issues down to a minimum, eliminates rework, and maintains timelines. Planning takes into account all facets of the project. The following are some things to take into consideration:

- What are your project's objectives? Hold discussions with stakeholders, such as an internal marketing department, management, or an external client. Agree on the objectives of the project; for example, providing information, selling to new clients, up-selling current clients, and so on.
- Who is the intended audience? A deliverable designed to appeal to eight-year-old girls will be different from one designed for neurobiology graduate students. To understand your audience, analyze the demographics, including age, gender, profession, culture, education, ethnicity, computer literacy, and so on. Do not assume. Research often reveals surprises. If you have access to a marketing department, they will often have this information for you.
- What is the output? Deliverables designed for the web will differ from those that will go to print. Consider things such as resolution, technology, and design. For highly technical projects, you may need to consult the technology team for specifications.
- What assets are available? Will you be provided assets such as photos, illustrations, and copy, or will you need to acquire or create them yourself?
- What resources can you draw upon? Will you have a team of people? Can you hire contractors with specific skills, such as photographers, copy writers, and illustrators?

The following documents are created during the planning stages of a project. For smaller projects, this information may be combined into one document with separate sections.

- The project plan: This document details the specifics of the project, such as project objectives, audience, deliverables, output, and more.
- Human resource plan: This is an optional document that specifies the people involved, their roles and responsibilities, dates needed, and resource costing. Detailing this information makes sure the right person is available at the right stage of the project. One of the biggest mistakes in project management is overbooking your people, so it is important to be realistic.
- Communication management plan: This is an optional document specifying when certain communication should occur and methods of communication, as well as any hierarchical communication chains needed for issue escalation. Dissemination of information throughout the team is crucial to ensure everyone is on the same page and working together. This can eliminate duplication of efforts that slow the project or eliminate gaps in the development process that can bring a project to a standstill. Regular communication with external clients is necessary to keep them informed of any issues that might affect the delivery of the project in terms of scope, budget, quality, or completion date.
- Risk management plan: This document identifies any possible stumbling blocks with resources, time, technology, and so on. Contingency plans are often crafted in advance in case they are needed. Anticipating problems and being prepared for them keeps the project moving forward.
- Cost management plan: This document breaks the project down in terms of cost. Because no company has unlimited funds, this document is crucial and usually requires approval from management.
- Procurement plan: This optional document specifies outside vendors needed to supply assets and resources. Do you need to hire an outside agency to provide photos, illustrations, or code? If your deliverable is a printed piece, do you need to secure a print house? You will probably solicit bids from outside vendors to get the highest quality at the best price. All this information can be documented in your procurement plan.
- Schedules and timelines: Knowing when the project is to be completed is obviously important. However, dividing the project into phases, or even sub-phases, with corresponding due dates will tell you when the project is going smoothly or when it starts to fall behind, requiring the implementation of one of your risk management contingency plans.

Execute

During the execute phase, the team develops the product or service, using the planning documents as a guide. The deliverable of the building phase is the project itself, either a product or service.

Control

Control involves monitoring and overseeing the project to make sure it is delivered on time and on budget with the expected quality. It is during this phase that modifications to the project scope and planning documents are made and approved, based on any changes required to the project.

Close

The closing phase wraps up the project. The product or service is delivered, the contract is closed, and vendors are paid. External processes or other products are evaluated to see if updates are required, based on the release of the new product or service.

Feedback on Design Plans

Communication is crucial throughout the project. It is estimated that communicating takes up 90 percent of a project manager's time. A good communicator can really streamline a project.

Verbal communication has the advantage of voice inflections and body language that convey so much more than words alone can. Through verbal communication, you will know when a team member is frustrated with an issue, and you can step in to find solutions. Relying on verbal communication alone, however, can leave you open to miscommunication. Verbal information might be misunderstood, forgotten, or not heard at all. Written communication used in conjunction with verbal communication is better if the writing is clear. It gives you a paper trail, something to refer to when miscommunications arise.

A project that involves visual design can be especially challenging regarding communication, but if handled well, can keep the team on track. In the beginning of the design process, usually quick thumbnails of potential designs are presented to stakeholders and the team. Discussions take place, and the design is honed down to a few possibilities. More detailed comprehensives (comps) of the selected designs are created, distributed, and discussed, until one design is agreed upon. There may then be additional modifications of the chosen design.

During and after each design meeting, it is good practice to record the decisions made. Send an email with the chosen designs to all team members and stakeholders. Summarize the discussion and decisions. If anything was heard incorrectly, the participants have a chance to speak up and correct the miscommunication immediately before unnecessary work begins.

When a design has been selected and honed, create a design document. A design document communicates the design guidelines to the team members. This keeps the design visually unified and coherent as the project advances. Design documents might include sample layouts, font specifications, styles, colors, resolutions, and more. This document can be especially important if the deliverable is something that will need constant maintenance after the project is completed, such as a website.

Guidelines for Establishing Project Requirements



Note: All Guidelines for this lesson are available as checklists from the **Checklist** tile on the CHOICE Course screen.

Establish Project Requirements

There are several guidelines to follow when establishing project requirements in order to ensure sound project management:

- Analyze target audience:

- Project purpose and objectives
- Final outcome
- Audience
- Audience needs
- Manage each stage of the project life cycle:
 - Initiate
 - Plan
 - Execute
 - Control
 - Close
- Use common project management practices:
 - Avoid common issues
 - Ensure the delivery plan is acceptable
 - Set standards
 - Ensure proper communication
 - Delegate tasks

ACTIVITY 2–1

Establishing Project Requirements

Scenario

The theatre's upcoming Shakespeare Festival will require many types of published documents including brochures, pamphlets, playbills, programs, lobby sheets, advertisements, flyers, discount coupons, posters, sales and marketing materials, and more. Your team is preparing to meet all the design and production requirements for the festival. Before you get started, you have decided to have a discussion about project management with the team. You want to make sure everyone understands the considerations and complexities involved in producing all the materials, and answer any questions team members may have.



Note: Discuss the questions and answers as a class. There are no "right" or "wrong" answers, only thoughtful discussion and sharing of ideas. If you have project management experience, please share your insights with the group.

-
1. Answer the questions in a round table discussion.

With regard to producing print and web materials for the upcoming Shakespeare Festival, what aspect of managing the project do you think will be the most challenging?

2. Among the existing team members (classmates), how might you divide up both the project management tasks listed in the topic content and the production tasks listed in the scenario?
-

TOPIC B

Apply Design Principles

In order to produce the highest quality of work possible in Adobe InDesign, you need to be familiar with the most up-to-date design principles. An understanding of these design elements and how they come together to produce results that are visually appealing, as well as informative, is crucial.

Design Principles and Elements

Graphic design is a purposeful, informational, creative process. You can gain a better understanding of the basics of graphic design by studying the elements and principles that govern effective design and page layout.

The following table describes design principles and their definitions.

<i>Design Principle</i>	<i>Description</i>
Emphasis	The part of the design that catches the viewer's attention. Usually the artist will make one area stand out by contrasting it with other areas. The area will be different in size, color, texture, shape, etc.
Movement	The path the viewer's eye takes through the artwork, often to focal areas. Such movement can be directed along line edges, shape, and color within the artwork.
Balance	The equal distribution of visual weight in a design.
Unity	The feeling of harmony between all parts of the artwork, creating a sense of completeness.
Color	Used to unify, separate, emphasize, and decorate. Color intensity, saturation, shade, and texture can be used to design a page effectively.
White Space	The area on a design that contains no content. When used appropriately, it helps to reduce clutter.
Alignment	Creates order and organization among elements.
Line	A mark with greater length than width. Lines can be horizontal, vertical, or diagonal; straight or curved; thick or thin.
Contrast	Emphasizes or highlights key elements within your design. The greatest contrast is achieved when two elements are total opposites.
Rule of thirds	Allows you to achieve a visually appealing balance by dividing your layout into three equal parts.
Proximity	By grouping similar elements together or in close proximity, you create a relationship between those elements.

Visual Hierarchy

Visual hierarchy is critical in design because it is the basis of communication between the designer and the target audience. Since people generally process things on a visual basis, they tend to see relationships between and categorize the things that they see. For this reason, it is important for designers to arrange objects in such a way that they are visually appealing.



Figure 2–2: Elements of visual hierarchy.

Visual Hierarchy Element	Description
Size	One of the most effective ways to create a visual hierarchy in design. Use size to convey importance, making more important design elements larger and less important design elements smaller.
Color	Color can be used in two ways: as an organizer tool and as a personality tool. Use of color in certain ways can demand attention, bring emotional appeal, affect brand, create symbolism, and classify information.
Contrast	Contrast is used to show the relative importance between different design elements. This can include intense changes between the size of the text or colors used.
Alignment	Use alignment to create order between the various elements on the page. Alignment can come in the form of separate columns or can be more complex, such as where information is positioned on a page to gain attention.
Repetition	Assign meaning to an element compared to other elements on a page by being repetitive in its appearance. This allows the viewer to pay particular attention to those elements that are not repetitious.
Proximity	This is a way to separate elements from each other and a designer can use proximity to create sub-hierarchies. This is the fastest way to associate content that is similar.
Density and Whitespace	Finding a balance between packing elements too densely and spacing them out too much is crucial. The key is to ensure the page is not too cluttered, but that the elements retain their relationship to one another.
Style and Texture	The use of style and texture on a page to create feeling, and via that feeling, create a hierarchy of the elements.

Symbols and Representative Graphics

Sometimes, pictures say more than words, or at least convey information more efficiently. This is where the use of symbols and representative graphics comes in. Using charts, graphs, maps, special icons, and other such graphics can help you more effectively inform your reader. Symbols and graphic elements can be created in InDesign or imported. For instance, you can create a chart by using the **Table** panel or you can import graphical information from Microsoft® Excel®.

Glyphs and special characters are also useful when conveying information to the reader. Glyphs are characters that have specific form. They can be special letters, symbols, fractions, currency signs, smilies, wingdings, and more. For example, some fonts have various forms for a capital A. You can also use the **Glyphs** panel to insert OpenType attributes into your document, such as swashes, ornaments, ligatures, and fractions. Special characters, such as em-dashes and en-dashes, ellipses, and registered trademark symbols, are also easy to insert and useful for conveying information.

The **Glyphs** panel can be displayed by selecting **Window→Type and Tables→Glyphs**. You can then select the font from the bottom of the **Glyphs** panel. There are potentially thousands of glyphs to choose from.

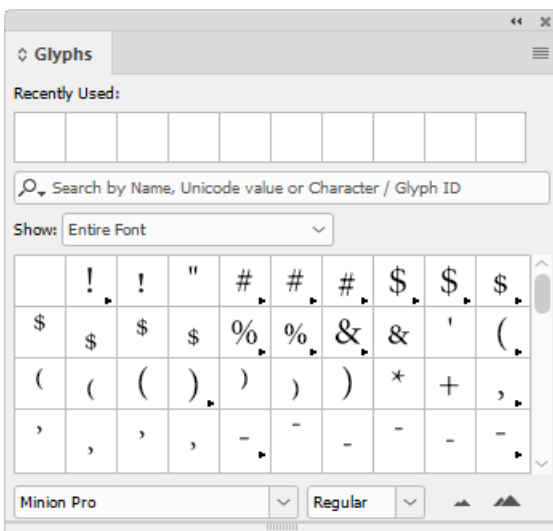


Figure 2–3: The Glyphs panel.

Guidelines for Applying Design Principles, Elements, and Composition to a Design

Apply Design Principles, Elements, and Composition to a Design

Use these guidelines for applying design principles, elements, and composition to your design:

- Use Primary Principles
 - Attempt to maintain both unity and variety.
 - Choose a font that can be used across all elements involved in the project.
 - Use the same color scheme throughout the project.
 - Create variety in the following ways:
 - Use two styles of the same typeface, such as condensed and bold.
 - Use different sizes or colors of the same graphic element.
- Hierarchy, Dominance, Balance, and Proportion
 - Use graphic elements, such as images and text, to guide the viewer's eye to specific details of the design, such as event information.

- Change characteristics of a specific graphic element in order to make it dominant.
- Manipulate the relationship of elements in your composition by changing their size in relation to one another, thus changing the balance.
- Change the proportion of design objects in order to create emphasis on the right graphic or text item.
- Elements of Design
 - Lines can represent anything from a leaf to a building.
 - Lines can also be more literal, creating divisions and borders in your composition, adding to visual interest and creating a visual hierarchy.
 - Utilize Adobe® Photoshop® CC brush tools to create lines from hard to soft, changing the feel of your design in simple yet effective ways.
 - Text can also be used to create lines and be manipulated by changing the direction or placement.
- Shape and Space
 - Shapes can be considered anything from a simple circle, to the silhouette of a person.
 - Shapes can be used to mimic or remind your viewer of something specific, such as a circle being reminiscent of the sun, or an array of rectangles set up as a city skyline.
 - Negative space can be a very useful element, creating a visually appealing balance and proportion.
 - Text can also be manipulated to mimic specific shapes, or made to coexist with a shape to create visual interest.

ACTIVITY 2–2

Applying Design Principles

Data File

C:\092023Data\Designing a Document\Flyer.indd

Scenario

Management at the playhouse has asked the print and web creative team to make a flyer that stands out and gets the message across. You have called the creative team together to discuss incorporating design principles into the flyer design. Some members of management will attend this meeting, and you want to make sure they understand the impact certain design choices will make on the effectiveness of the flyer.



Note: As a group, discuss the questions and answers. There are no right or wrong answers, only thoughtful discussion. If you have design experience, please share your insights with the group.

1. Open the file **C:\092023Data\Designing a Document\Flyer.indd**. When prompted, select **Update Modified Links**. If the **Search Adobe Stock + Adobe Help** window pops up, select **Close**.
2. Examine the flyer for visual hierarchy elements. If necessary, refer to the table in "Visual Hierarchy."
3. Answer the questions in a round table discussion.

What is the dominant element on the page, and what role does it play in conveying the message of the flyer?

4. **What role does color, size, and contrast play in effectively conveying the message of the flyer?**
5. **In the Scrimdown logo, what role does position play between the words "scrim" and "down"?**
6. **What other visual hierarchy elements do you see at work in the flyer?**

7. Close the file, discarding any changes.

TOPIC C

Create a New Document

At this point, you'll need to make some decisions regarding the page structure of your document. You'll also need to consider alternate sizes, orientations, or aspect ratios. In this topic, you will create a new document.

The New Document Dialog Box

The **New Document** dialog box has a number of components that can be used to create InDesign documents.

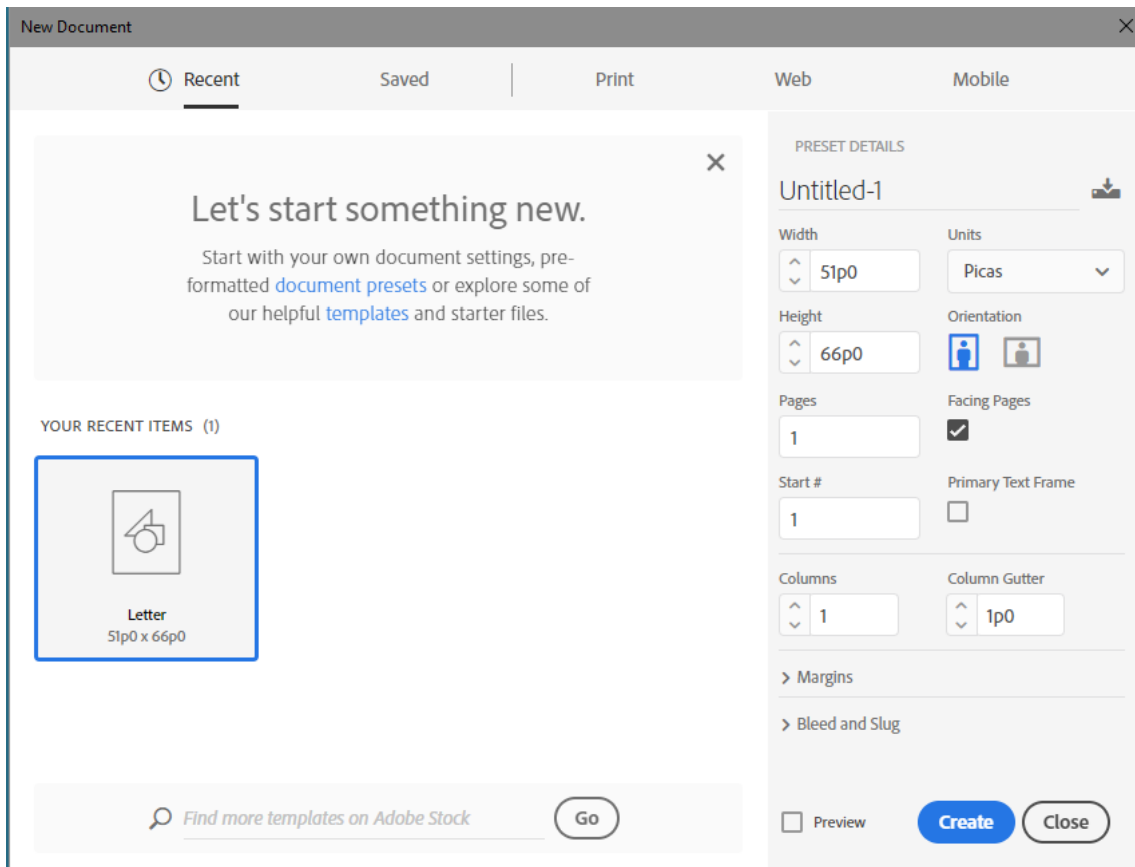


Figure 2-4: The New Document dialog box.

The following table summarizes all the components you can configure for your page layout.

Component	Description
Width	A text input box to enter the desired width of the page.
Height	A text input box to enter the desired height of the page.
Units	A drop-down list where you can select the desired unit of measurement. A few options include picas, inches, millimeters, and centimeters.

Component	Description
Orientation	A pair of icons that allow you to choose between a Portrait (vertical) or Landscape (horizontal) layout.
Pages	A text input box to enter the desired number of pages in the document.
Start #	A text input box to enter the page number that you'd like the first page of the document to begin with.
Facing Pages	A check box to indicate whether the document will use facing pages as in a <i>spread</i> , or single pages.
Primary Text Frame	A check box to indicate whether you'd like to place an empty text frame on the document's default master page.
Columns	A text input box to specify the number of columns.
Column Gutter	A text input box to specify the space between columns.
Margins	A section that lets you specify the top, bottom, inside, and outside margins in a document.
Bleed and Slug	A section that allows you to specify the settings for the bleed area and the slug. The bleed is the area beyond the edges of the document. Images that will print right to the edge of a document will extend into the bleed area. The slug is the area that contains non-printing document information.

Document Presets

Document Presets is a collection of settings that can be stored and applied to new documents. Document Presets includes settings for page size, page orientation, columns, margins, and other layout settings. All of these can be saved as a custom document preset and used later for other similar documents.

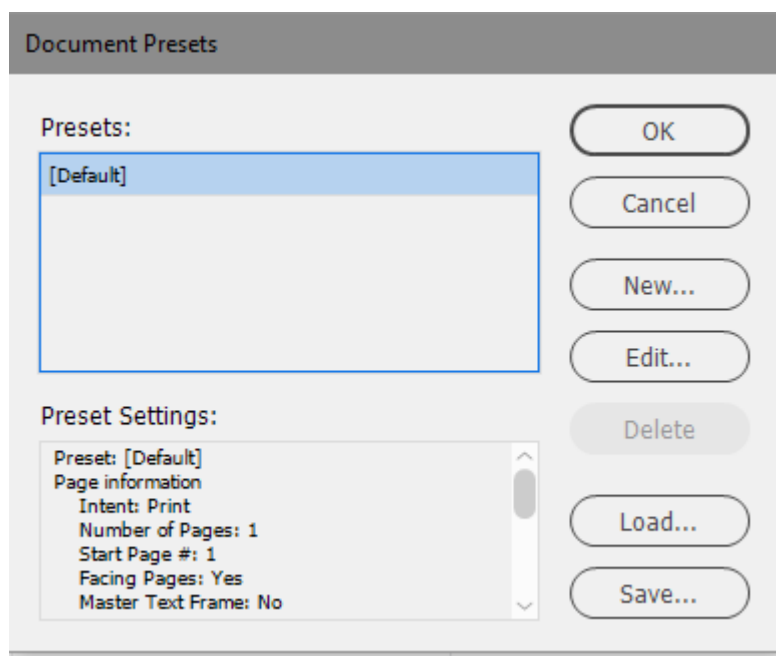


Figure 2–5: The Document Presets dialog box.

Starting Page Settings

When you create a multiple-page document, you have the option of setting it up in two-page spreads by checking the **Facing Pages** check box. You can also assign the page number that the start page will have. You enter this in the **Start #** box in the **New Document** dialog box. Entering an even number will start the document on a left-hand page. An odd number will start it on a right-facing page. You can change this setting later by using the **Document Setup** dialog box in the **File** menu.



Note: To learn more about creating documents with master pages, check out the Spotlight on **Using Master Pages** presentation from the **Spotlight** tile on the CHOICE Course screen.



Access the Checklist tile on your **CHOICE** Course screen for reference information and job aids on **How to Create a New Document**.

ACTIVITY 2–3

Creating a New Document

Before You Begin

InDesign is open. You will not open an existing document. Instead, you will create your own.


Scenario

As the in-house graphic designer for Scrimdown Playhouse, you are assigned the task of creating the playbill that will be distributed to audience members at all performances of the Shakespeare Festival. As you begin, you realize that there are no InDesign presets that meet your requirements for the playbill. You decide to create a custom preset for the playbill document and save it for creating playbills for future productions.

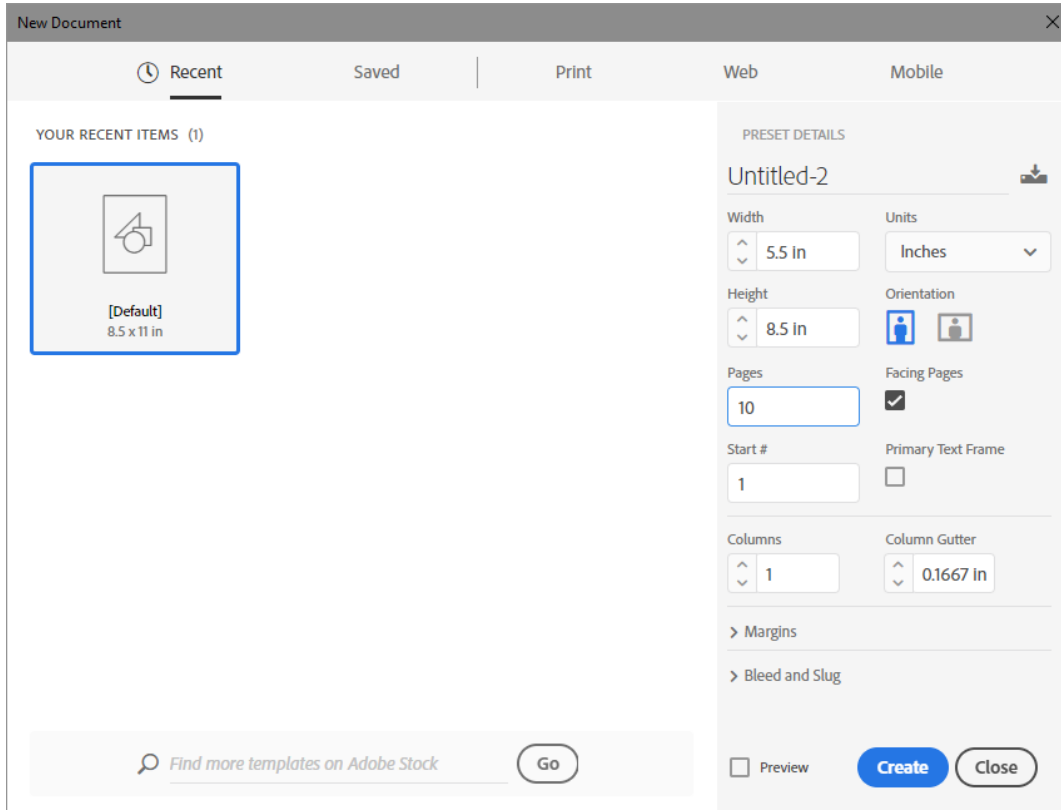
1. If necessary, change the **Units and Increments** setting to inches.

- From the **Menu** bar, select **Edit→Preferences→Units & Increments**.
You may have to scroll down to see **Preferences**.
- In the **Ruler Units** section, from the **Horizontal** drop-down list, select **Inches**.
- From the **Vertical** drop-down box, select **Inches**.
- Select **OK**.


2. Create a document that will be used to develop the brochure.

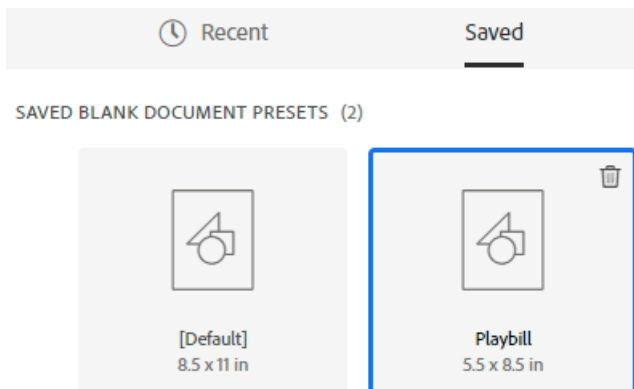
- Select **File→New→Document**.
- In the **Preset Details** pane on the right, in the **Width** box, type **5.5**
- In the **Height** box, type **8.5**
- In the **Pages** box, type **10**
- In the **Orientation** section, verify that the **Portrait** button is selected. 
- Verify that the **Facing Pages** check box is checked.

g) Accept the defaults for the remaining settings. The pane should look like the following.



3. Save the current setting as a preset so that it is available for future use.

- In the **New Document** dialog box, select the **Save Document Preset** button. 
- In the **Save Document Preset** box, type *Playbill*
- Select **Save Preset**.
- In the **New Document** dialog box, verify that **Playbill** now appears under the **Saved** tab on the left.



- Select **Create** to open a document with the specified settings.
- Select **File→Save**.
- In the **Save As** dialog box, navigate to the **C:\092023Data\Designing a Document** folder.
- In the **File name** box, type *My Playbill* and select **Save**.

TOPIC D

Add Text to a Document

You've created the structure and now it's time to fill it with the elements that will make it a document. Some projects will be very text-heavy with page after page of flowing text, whereas others may require only a few fields here and there to support graphics. InDesign gives you the tools to treat text the way you require for your particular project. In this topic, you will add text to a document.

Text Frames

A **text frame** is used to include text in a document, and to determine the flow of text in a layout. A text frame is typically rectangular in shape with handles for manual resizing. It can be placed anywhere in a document. The **Type tool** in the **Tools** panel allows you to type text in a text frame or select text inside it. InDesign offers a range of options to adjust the spacing between lines, between characters, and between the text and the text frame.

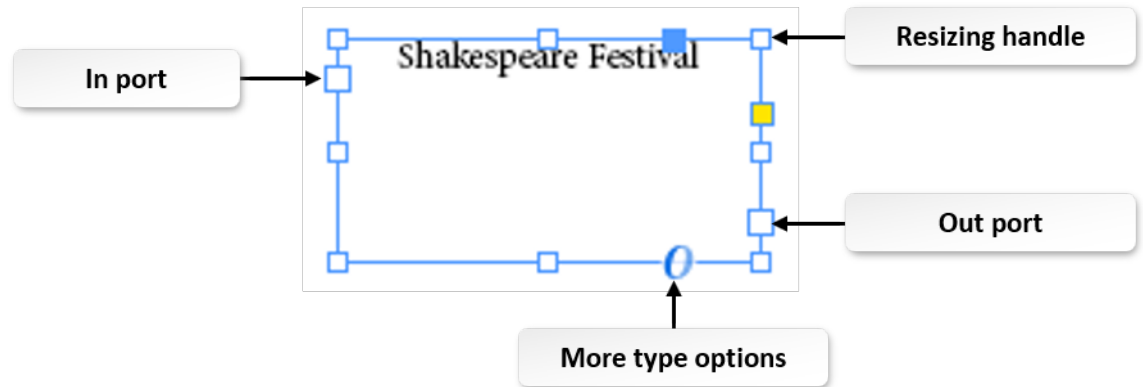


Figure 2-6: A text frame with text.



Note: The text frame has other boxes that will be used for features discussed later in the course.

The Control Panel

The **Control** panel lets you quickly access options, commands, and panels related to the objects selected in a document. By default, the **Control** panel is docked at the top of the document window. However, you can dock it at the bottom of the document window, convert it to a floating panel, or hide it.

The **Control** panel is not shown by default in the Essentials workspace, as many of the options in the **Control** panel are provided in the **Properties** panel. You can display it by selecting **Window→Control**.

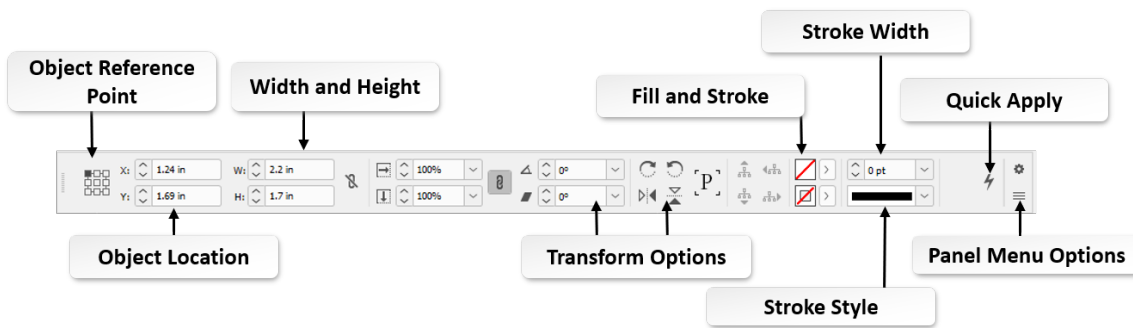


Figure 2-7: The Control panel.

The Text Frame Options Dialog Box

The **Text Frame Options** dialog box includes the **General**, **Baseline Options**, **Auto-Size**, and **Footnotes** tabs that provide options for defining a range of text frame settings.

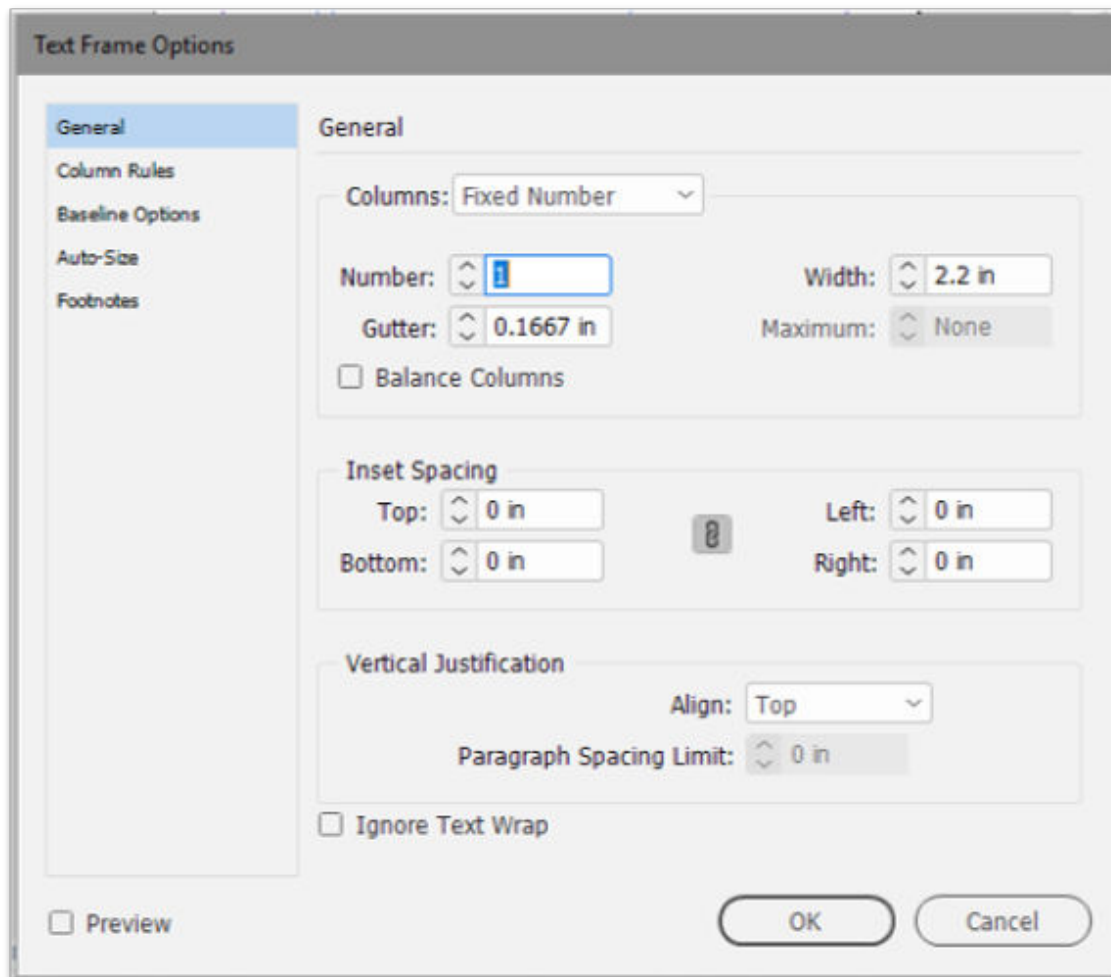



Figure 2-8: Text Frame Options dialog box.

<i>Component</i>	<i>Enables You To</i>
Columns	Define the number of columns, their width, and the spacing between them. Selecting Fixed Width allows you to change the number of columns without changing their width while resizing a text frame. The Balance Columns check box will even out text at the bottom of a multi-column text frame.
Inset Spacing	Specify the margin space between the text and the text frame from the top, bottom, left, and right. The Make all settings the same icon  allows you to apply the same value to all the sides.
Vertical Justification	Align or distribute lines of text in the text frame along its vertical height.
Ignore Text Wrap	Ignore the text wrap setting in a text frame. This is useful when you'd like one text frame to wrap around an object while another appears within the object.
Preview	Preview the text and baseline grid in a text frame.
First Baseline	Define the baseline of the first character in a selected text frame. This is useful when you'd like the first character in a paragraph to appear much larger with the other text flowing around it. The Offset drop-down list lets you specify and distribute the font character of the text in the text frame in various ways. Min allows you to determine a minimum value for the selected baseline offset.
<i>Baseline Grid</i>	Define and adjust the leading for body text in a document as well as determine the consistency in the placement of text elements on a page.
Auto-Sizing	Set up a text frame so that it is re-sized automatically when you add, delete, or edit text.

The Place Dialog Box

The **Place** dialog box is used to place text and graphics in a document.

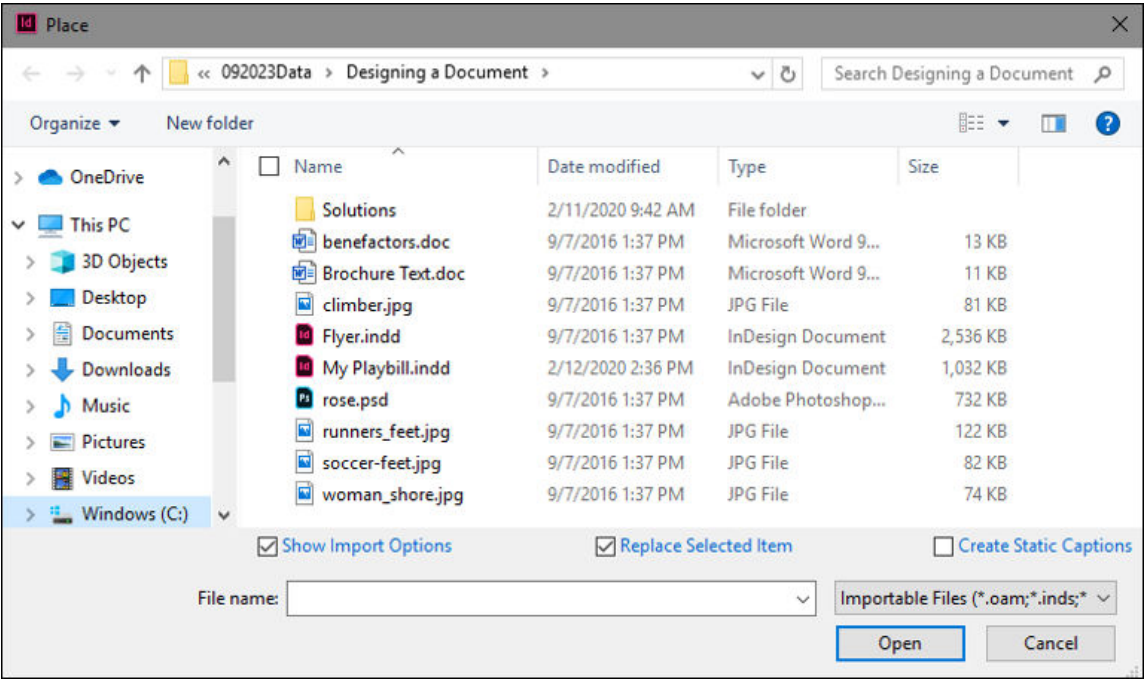


Figure 2–9: The Place dialog box.

Component	Description
File name	A field that enables you to enter a file name or view the name of the selected file.
File types	A drop-down list that enables you to select the type of files that you need to open.
Show Import Options	A check box that enables you to view the import options for the selected file type.
Replace Selected Item	A check box that enables you to replace the existing content in the frame with the imported file.
Create Static Captions	A check box that enables you to generate a caption after you place the image.

Drag and Drop

In InDesign, you can easily move text around by using the **Drag and Drop** feature, which by is default turned on in the **Story Editor** view, but not in the **Layout** view. However, these settings can be changed in the **Preferences** dialog box, which can be accessed by selecting **Edit→Preferences→Type**.

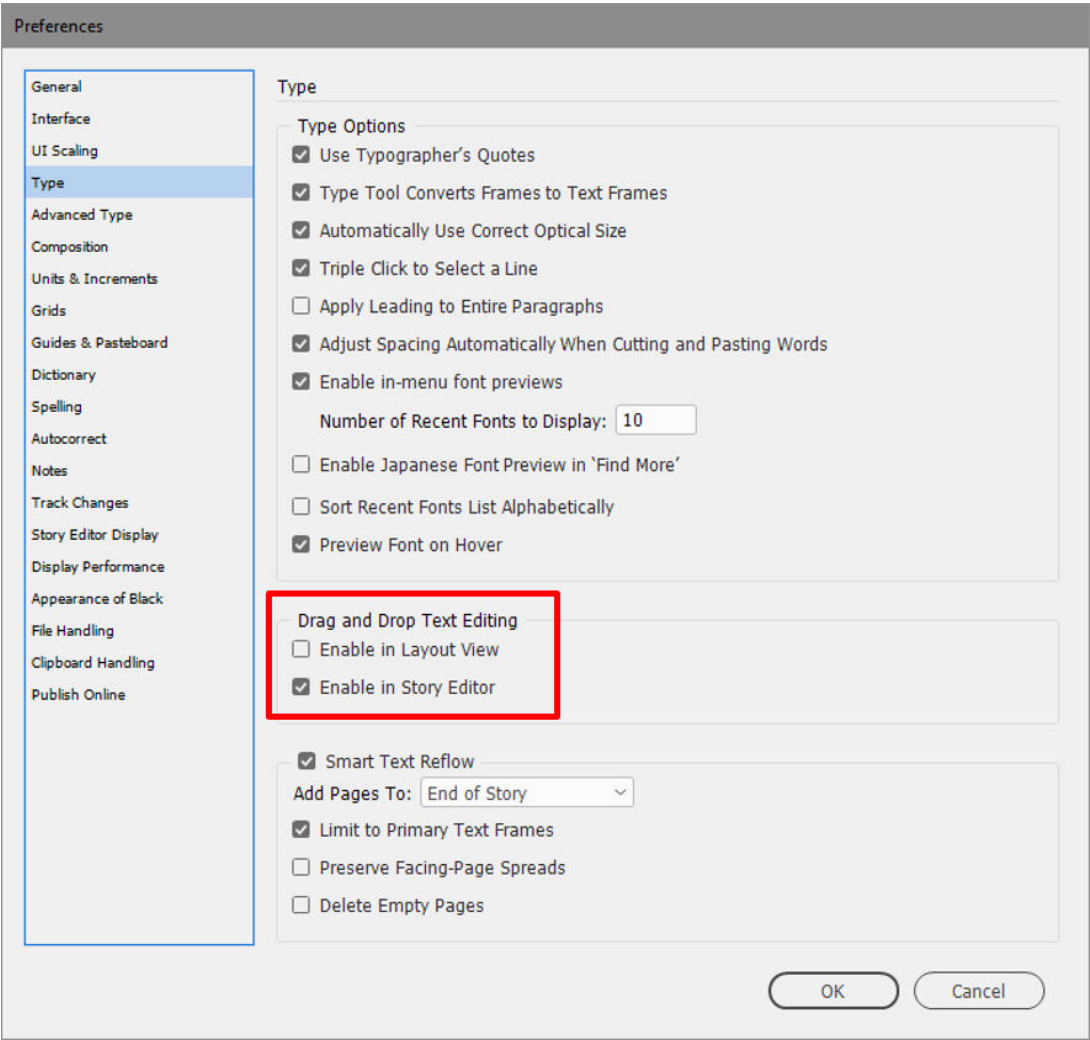


Figure 2–10: Drag and Drop settings.

Text Import Options

A range of options is available for importing text created by using different applications. The text importing options change based on the file type of the text.

File Type	Offers Options To
TXT	Set the computer language, platform, and the type of dictionary. You can also specify extra paragraph returns and apply formatting.
RTF	Specify the settings for removing and preserving style for text and tables. You can import paragraph and character styles automatically or customize the style by mapping the RTF and InDesign styles.
XLS	Specify settings for a worksheet of an XLS file. You can define the cell range of the sheet to be imported, and specify view options and the formatting of table, table style, and cells. You can also define the number of decimal places for the data in the spreadsheet, and retain the inline graphics from the Excel document in InDesign.

<i>File Type</i>	<i>Offers Options To</i>
DOC	Specify the settings for removing and preserving styles for text and tables. You can import paragraph and character styles automatically, or customize the style by mapping the DOC and InDesign styles.



Note: There are many more file types you can use. These are just some of the most popular file types.

The Multiple-File Place Feature

Importing multiple files at the same time is done in several ways. You can select multiple files in the **Place** dialog box by holding down the **Ctrl** key as you select each file. You can also drag multiple files from a folder into an InDesign document. The number and the thumbnail preview of the files imported are indicated next to the loaded text or the graphic icon. Use the arrow keys on the keyboard to page through the files, and the **Esc** key to unload a file from the loaded text or from the graphic icon.

Rulers

A **ruler** is an on-screen measuring device that is used to designate the vertical and horizontal positions of page elements in a document. Rulers are used to draw, align, or size objects with accuracy. The position where the zeros of the horizontal and vertical rulers intersect is called zero out or origin. You can also choose to hide the rulers.



Figure 2-11: Rulers.

The Text Flow Feature

The text flow feature allows you to flow text from one text frame to another. It's extremely helpful when creating text-heavy documents. There are different methods in which to flow text.

<i>Method</i>	<i>Description</i>
Manual	Adds text one frame at a time. You must reload the text icon to continue flowing text.
Semi-autoflow (by holding down Alt when you click)	Works like manual text flow, except that the mouse pointer becomes a loaded text icon each time the end of a frame is reached, until all text is flowed into your document.
Autoflow (by holding down Shift when you click)	Adds pages and frames until all text is flowed into your document.

Method	Description
Fixed-page autoflow (by holding down Shift+Alt when you click)	Flows all text into the document, adding frames as necessary, without adding pages. Any remaining text is overset.
Smart Text Reflow	You can use the Smart Text Reflow feature to add or remove pages when you're typing or editing text. This feature is useful when you're using InDesign as a text editor and you want a new page to be added whenever you type more text than can fit on the current page. It's also useful in avoiding overset text or empty pages for situations in which the text flow changes due to editing text, showing or hiding conditional text, or making other changes to the text flow.



Note: To learn more about typographic principles, check out the Spotlight on **Applying Elements of Typography** presentation from the **Spotlight** tile on the CHOICE Course screen.



Access the Checklist tile on your **CHOICE** Course screen for reference information and job aids on **How to Add Text to a Document**.

ACTIVITY 2–4

Adding Text to a Document

Data File

C:\092023Data\Designing a Document\benefactors.doc

Before You Begin


My Playbill.indd is open.

Scenario

As you design the layout for the Shakespeare Festival playbill, you decide that some text will be manually input and longer articles will be imported from external text files.

1. Create a text frame on page 2 of the playbill.

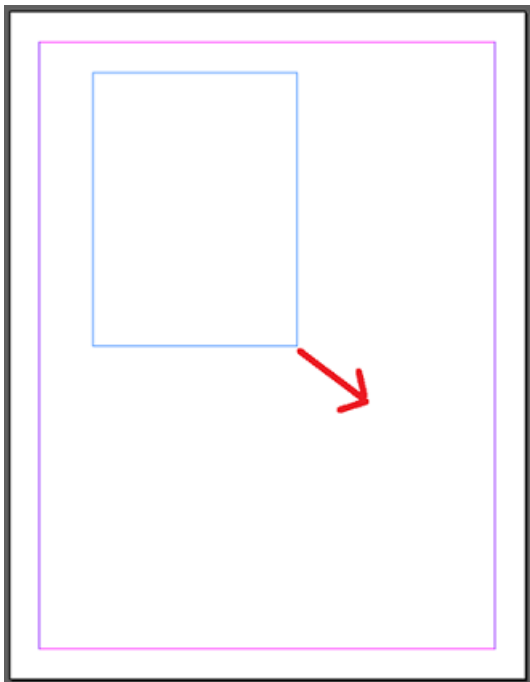
- a) At the bottom of the document window, on the **Status** bar, from the **Page Selection** drop-down list, select **2**.

- b) In the **Tools** panel, select the **Type** tool. 



Note: If the **Tools** panel is not displayed, select **Window→Tools** to display it.

- c) On page 2, create a text frame by clicking and dragging from the top-left corner of the red margin box, downward toward the bottom-right corner of the margin box.



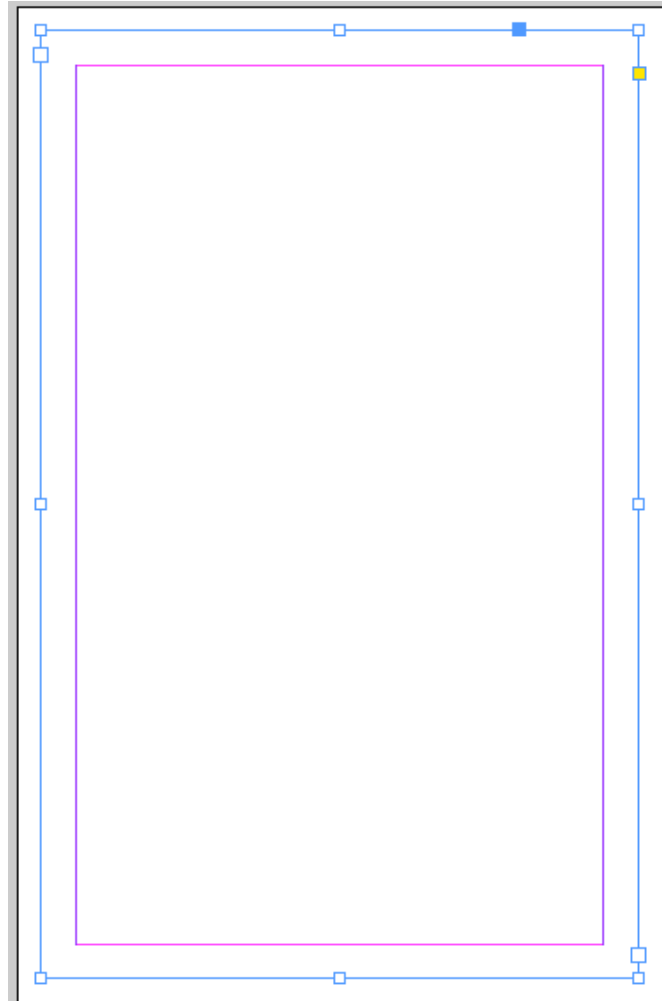
- d) In the **Tools** panel, select the **Selection** tool. 

- e) In the **Control** panel at the top, in the **X** field, select the value, type **0.2** and then press **Tab**.



Note: If the **Control** panel is not displayed, select **Window→Control** to display it.

- f) In the **Y** field, type **0.2** and press **Tab**.
- g) In the **W** field, type **5.1** and press **Tab**.
- h) In the **H** field, type **8.1** and press **Enter**.



2. Place text in the text frame.

- a) Double-click inside the text frame.
- b) Select **File→Place** and in the **Place** dialog box, check the **Show Import Options** check box.
- c) From **C:\092023Data\Designing a Document** select **benefactors.doc** and select **Open**.

- d) In the **Microsoft Word Import Options (benefactors.doc)** dialog box, in the **Include** section, uncheck the **Footnotes** and **Endnotes** check boxes and select **OK**.



Note: You will notice that the text in benefactors.doc is raw and has not been formatted yet.

Our Supporters
 Leading Players \$2500+
 Greene City Savings Bank, Andrew Black Charitable Foundation, Brent
 Haywood and Carole Henrikson Family Foundation
 Backers \$1000+
 Denise Christman Memorial Trust, Dr. Frederick Ashbough Service Fund,
 George Frome Memorial Fund, Hannah Eckels Philanthropic Fund
 Supporters \$500+
 Greene City Natural Eatery, Jayson Madsten, Marie DeJesus, Melinda
 Joseph
 Producers \$250+
 Miranda Lakeley, Ava Giroux, Dietrich Brown, Kim Chan, Frank Pendelton,
 MaryJo Peters, Jackson Myers, Alex McDonald
 Directors \$100+
 Avery Billups, Mark Sanders, Andrew Zucker, Martin Smith, David
 McMurtry, Jane Woodward, Alex Jaffey, Shanelle Newsom, Sylvia
 Alvarez-Ortiz, Angie Blumquist, Asa Stern, Dexter Collingsworth, Johanna
 Kiergaard, Greg Shannon
 Patrons \$50+
 James Krenoff, Art Nuvo, Tog Frydd, Henry Maudsley, Will Morris, Chad
 N. Freude, Fyodor Terlov, Charlie Greene, Barney O'Skye, Albert Hubbard,
 Robert T. Farnsworth, Lynn Z. Bachmann, Jorge Nakashima, Tadeusz
 O'Reilly, Edward Rajasethupathy, Leonard O. Chan, Oswald Sagawa,
 Daniel C. Wilson, Jerome J. Jenkins, Amparo Sugalan, Jillian M. deGaulle,
 Billy Logrund, Nancy X. Elliot, Norman Abraham, Gunther Chang, Kelly
 Poppenheimer, Sam Meyer, Pooja Rao, Nettie Murray, Muhammed Smith,
 Vivian Wong, Jenny Lind, Hector Martinez, Edna Goldwin, Gertrude
 Stickley, Roylene T. Underhill, Erin Claypoole, Murray Goldman, Candace
 Burroughs, James Hendricks, Charlotte E. Aiken, Frank Wright, Simon
 Gonzalez, Solomon Jones, Eddie Hundt, Bess Maddocks, Margaret
 O'Brien, Guillermo Schwartz, Helga Ramirez, Willis N. Poonsami, Felix
 Schlechter, Earl Siegfried, Macabe Massey

- e) Select **File→Save** to save the file.
 f) Leave the file open for the next activity.

TOPIC E

Add Graphics to a Document

Now that you've placed text in your document, you'll want to consider adding graphics. The graphics will enhance your document by supporting the text and making the document more engaging and visually interesting. InDesign offers many options to create, import, and manipulate graphics. In this topic, you will add graphics to a document.

Shapes

Shapes are containers for the placement of text and graphics. InDesign offers the ability to create rectangles, rounded rectangles, beveled rectangles, inverse rounded rectangles, ellipses, triangles, and polygons. There are various settings that you can specify for each of these shapes. You can right-click the **Rectangle** tool to select between **Rectangle**, **Ellipse**, and **Polygon**.

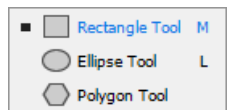



Figure 2–12: Shapes.

Polygon Settings

When you double-click the **Polygon** tool , the **Polygon** dialog box opens and allows you to specify the number of sides, as well as the star inset percentage.

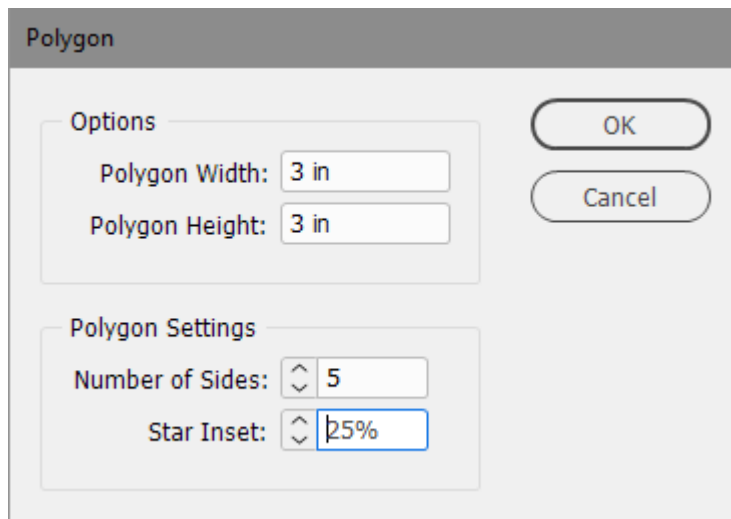


Figure 2–13: The Polygon dialog box.

Grouping and Locking Objects

Objects in your file can be grouped together (**Object**→**Group**) so that they can be repositioned on the page relative to each other. Settings applied to grouped objects will cause each object in the group to have those settings. Locking objects (**Object**→**Lock**) will disable repositioning or editing of the object. This prevents unintentional changes to an object once you've specified its settings.

Graphic Frames

A **graphic frame** is a container or placeholder for images. It has eight handles to control and define the vertical and horizontal dimensions of the frame. When you use the **Rectangle Frame**, **Ellipse Frame**, or **Polygon Frame** tool to create a graphic frame, the diagonal lines inside the frame indicate that no image has been placed yet.

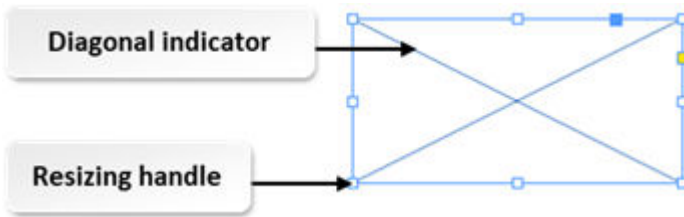


Figure 2-14: A rectangular graphic frame before an image is imported into it.

The Auto-Fit Option

Images that are imported into InDesign can be re-sized automatically to fit in the frame they are placed in. The **Auto-Fit** option can be set for a graphic frame to allow any image that is placed in it to be re-sized to the size of the frame. If the frame is later re-sized, the image is re-sized with it.

Image Import Options

There are a range of options available for importing images created in other applications. The image import options in InDesign are based on the file type that is being imported. These file types include EPS (Encapsulated PostScript), BMP (Bitmap), PNG (Portable Network Graphics), PDF (Portable Document Format), and INDD (InDesign).

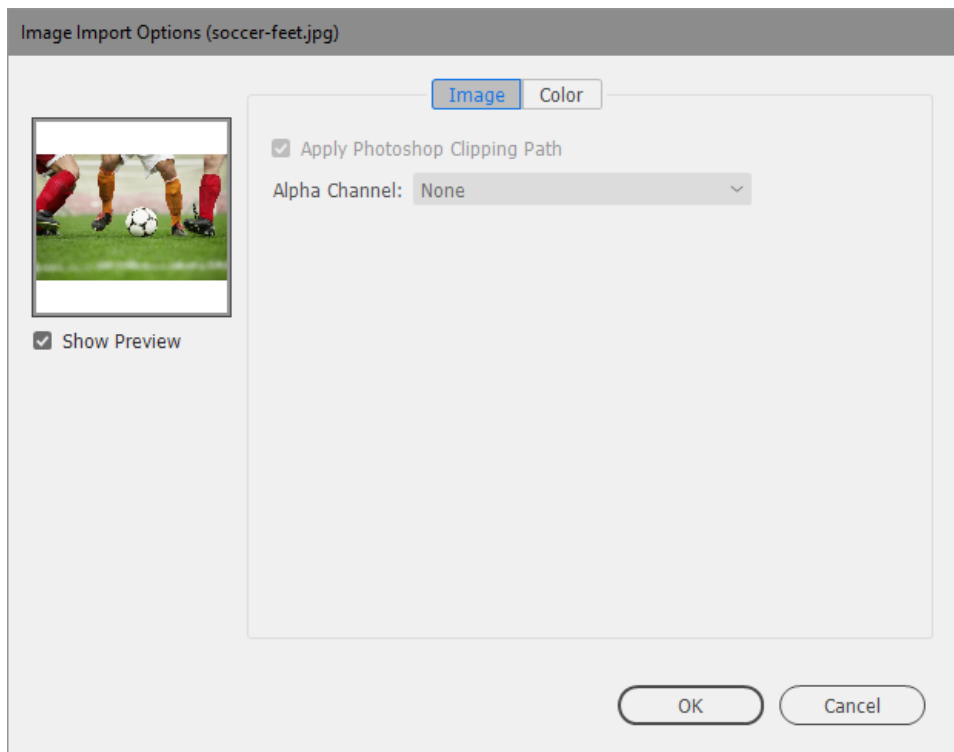


Figure 2-15: Image Import options.

Place Gun

The **Place Gun** is a mouse pointer state in InDesign that is enabled while placing images into a document. You can load multiple images to the **Place Gun** by selecting the images in Adobe® Bridge or in Windows® Explorer. Once the **Place Gun** is loaded with images, you can place the images in their respective grids by clicking in the grids.

Editing Images in their Native Application

You can open files in their original application for image editing by selecting the image and then choosing the **Edit Original** command from the **Links** panel options menu.

Captions

A caption (**Object→Captions**) is descriptive text that appears below an image. InDesign provides several methods for creating captions that display the image metadata you specify. When you generate a caption from an existing image, you can generate either a static caption, which can be modified only manually, or a live caption, which is updated if the image or the image metadata changes.



Note: To learn more about using the drawing and painting tools, check out the Spotlight on **Using Drawing and Painting Tools** presentation from the **Spotlight** tile on the CHOICE Course screen.

Text Wrap

Text wrap refers to the different settings that allow text to flow around another object in a variety of ways. When text wrap is applied to an object, InDesign creates a boundary around the object that keeps the text from printing on top of the image. Text can be wrapped to the right, left, or to the largest side of the object. Text can also be wrapped in various wrap shapes.

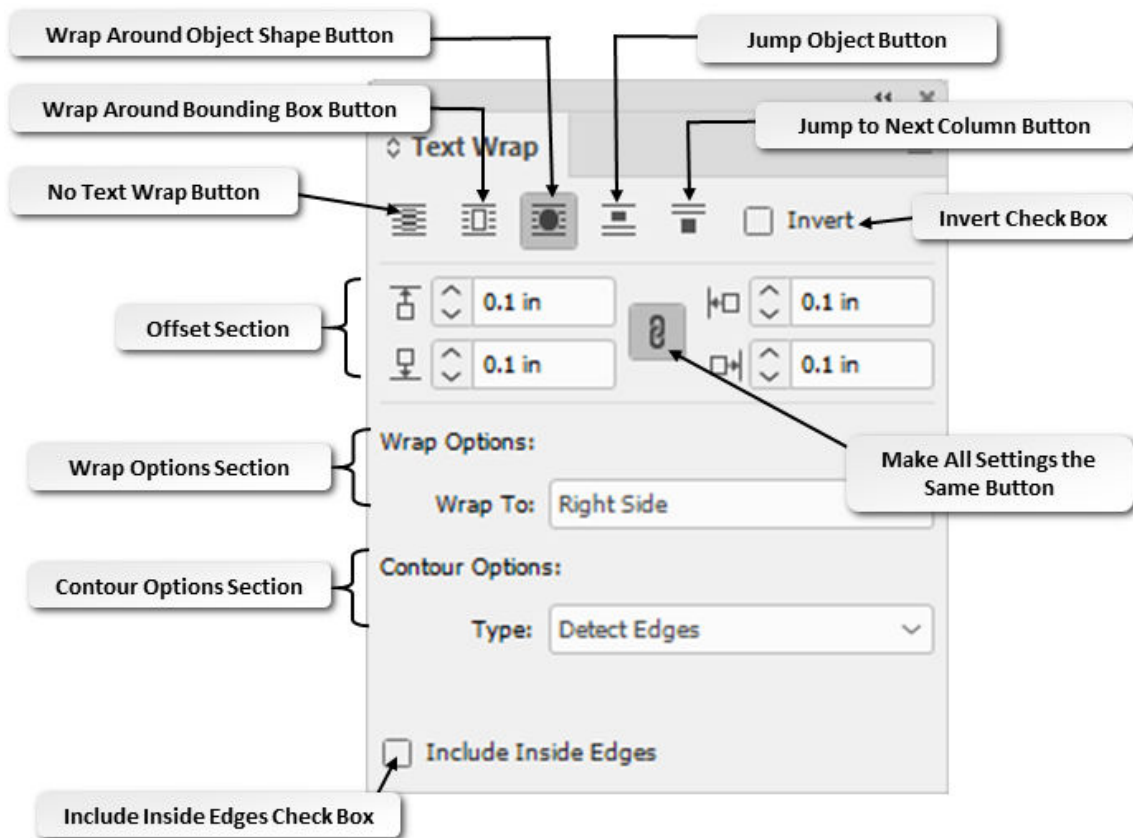


Figure 2-16: Text Wrap settings.

A **rectangular text wrap** allows you to wrap text around the squared edges of a rectangular frame. A **contour text wrap** allows you to wrap text in the shape of the selected frame. You can apply specific text wrap settings by using the **Text Wrap** panel.

Component	Description
No Text Wrap	A button that allows you to flow text behind the object without any wrapping.
Wrap Around Bounding Box	A button that lets you create a rectangular wrap so that text flows around that rectangle.
Wrap Around Object Shape	A button that allows you to flow text around the contours of the selected object.
Jump Object	A button that allows you to flow text to the next available space, such as left, right, top, and bottom of the frame.
Jump to Next Column	A button that lets you flow text to the immediate column or text frame.
Invert	A check box that allows you to flow text within an object. Text within the object flows to take the shape of that object.
Offset	A section that allows you to specify the top, bottom, left, and right offset values to move the wrap away from the frame or within the frame.
Make All Settings the Same	A button that allows you to specify the same values for all settings in the Offset section.

Component	Description
Wrap Options	A section that allows you to specify the sides to which you want to apply the text wrap.
Contour Options	A section that allows you to specify the type of edges and connection points during the wrapping process.
Include Inside Edges	A check box that allows you to include and wrap even the inside edge area between text and object.

The Info Panel

The **Info** panel displays information about the width, height, size, and rotation of selected objects. It deals with the horizontal and vertical positions of the mouse pointer, the distance an object or tool has moved from its starting position, the degree of rotation, and the width and height in current units. In addition, this panel provides an effective control over word counts, the number of paragraphs and lines, and so on when a text file is selected.

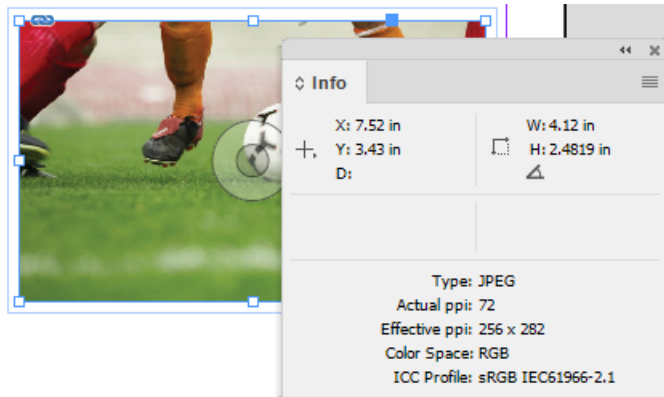


Figure 2-17: The Info panel.

When you select a graphic file with the **Info** panel open, the panel displays information about the file type, actual and effective pixels per inch, and color profile. You can use the **Info** panel to find hidden information about a document, but you can't use the panel to edit or enter values.

The Links Panel

The **Links panel** tracks and displays all the images and external files that are used to create a primary InDesign file. When a linked file is double-clicked, the **Link Info** section displays information such as the name, format, size, type, date, time, and path of the file. The **Links** panel also provides information on updates when you modify an InDesign file placed within the primary InDesign document.

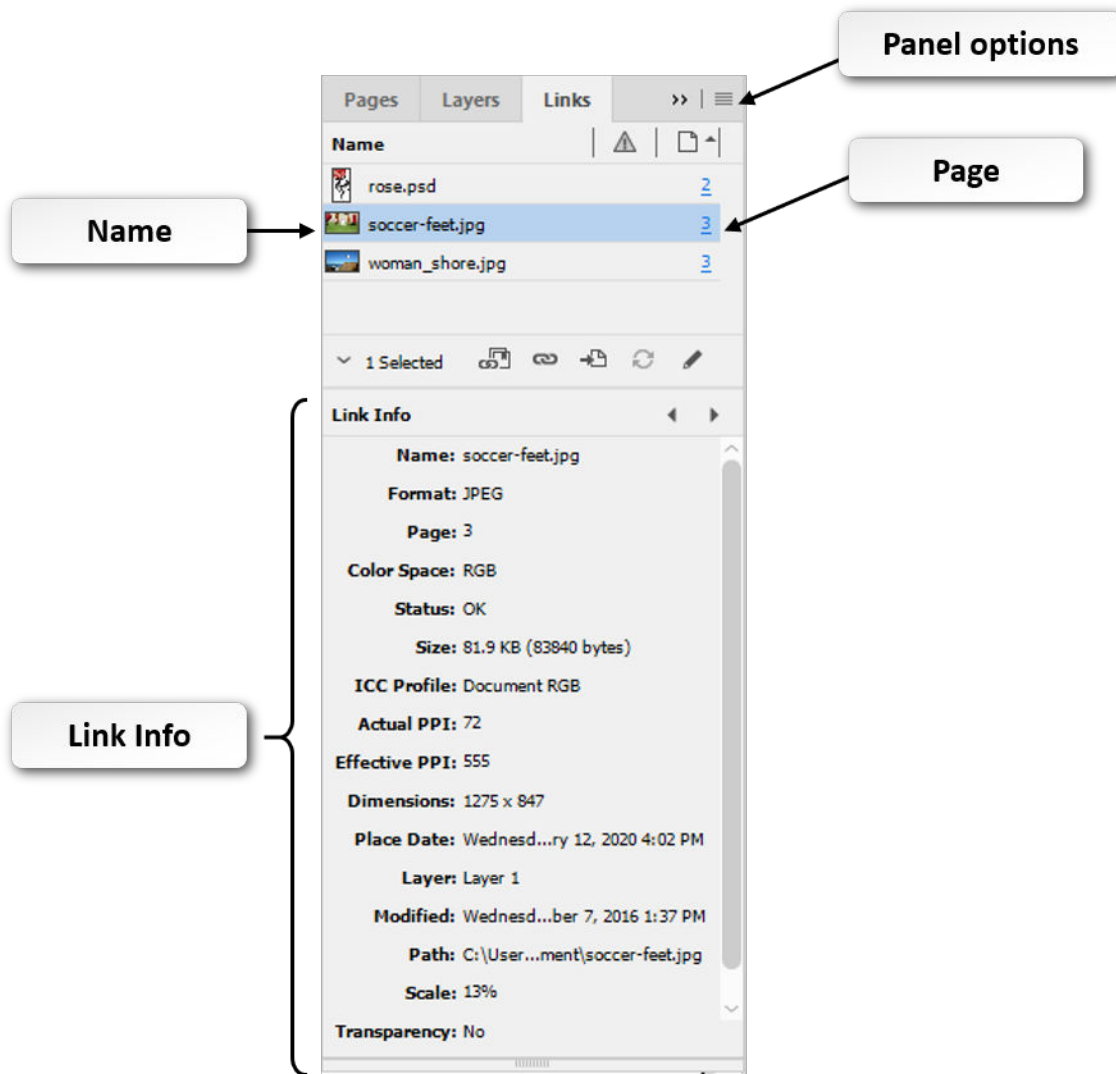


Figure 2–18: The Links panel.

The **Links** panel has a range of components that help you track and display information about images.

Component	Description
Name	A section that lets you view additional file information such as the file name and file type.
Page	A section that displays the page number where the image is located in a document.
Link Info	A section that displays information such as the selected file's name, file type, page number, creation date and time, file size, and location.
Panel options	A menu in the upper-right of the panel that lets you relink the image or folder, update links, select the specific links, and edit images by using the default or different applications.



Note: InDesign allows you to place the same image in a number of locations within a document. This results in the same image being displayed with multiple links in the **Links** panel. When the **Collapse Multiple Links to Same Source** check box in the **Panel Options** dialog box is checked, the multiple links available for an image will appear as a group in the **Links** panel.

Display Performance

The term *display performance* when related to an image refers to the pixel dimension of an image that controls the resolution of images in a document. There are three types of display settings: **Fast Display**, **Typical Display**, and **High Quality Display**. You can determine the display settings either for the entire document or for specific graphics so that these options do not affect the print quality of exported output. You can use the **Allow Object-Level Display Settings** option to preserve the same display performance for all the images or specify different display performance settings for each image. The **Clear Object-Level Display Settings** command is used to remove the display settings for all the images in a document.

Setting	Allows You To
Fast Display	Display an image at low resolution. This helps you quickly move through numerous pages of a document containing a lot of images and transparency effects.
Typical Display	Display an image at balanced image resolution for identifying and positioning purposes. It's the default option that enables you to strike a balance between image quality and display performance of an image.
High Quality Display	Display a raster image or vector graphic at high resolution. This will make navigating quickly through the document more difficult.

Pixel Dimensions and Resolution

Pixel dimensions measure the total number of pixels along an image's width and height. Resolution is the fineness of detail in a bitmap image and is measured in pixels per inch (ppi). The more pixels per inch, the greater the resolution. An image with a higher resolution produces a better printed image quality.



Access the Checklist tile on your **CHOICE** Course screen for reference information and job aids on **How to Add Graphics to a Document**.

ACTIVITY 2–5

Adding Graphics to a Document

Data File

C:\092023Data\Designing a Document\rose.psd


Before You Begin

My Playbill.indd is open.

Scenario

You've begun to build the benefactors page of the Shakespeare Festival playbill by importing text. Now you feel the page needs more visual interest so you decide to add a graphic and wrap the text around it.

1. Create a graphic frame.

- a) In the **Tools** panel, select the **Rectangle Frame** tool. 
 - Do not mistake the **Rectangle Frame** tool for the **Rectangle** tool.
- b) In the document window, create a rectangle frame by selecting and dragging from the top-left corner of the margin rule, toward the lower-right corner. You do not have to be precise about the dimensions of the rectangle.
- c) In the **Control** panel, specify the following values:
 - **X** = 0.2
 - **Y** = 0.2
 - **W** = 4.0
 - **H** = 4.0

2. Place the image in the graphic frame.

- a) On the **Menu** bar, select **File→Place** and then in the **Place** dialog box, verify that the **Show Import Options** check box is checked.
- b) If necessary, navigate to **C:\092023Data\Designing A Document** and double-click **rose.psd** to open it.
- c) In the **Image Import Options (rose.psd)** dialog box, select **OK**.
- d) Select **Object→Fitting→Fit Frame to Content**.
- e) Verify that none of the image is cut off by the rectangular frame.
 - It is okay if the image of the rose is on top of the text box. You will flow the text around it.
- f) In the **Control** panel, in the **X** field, select the value, type **0.2**, and press **Enter** to align the rose to the text on the left edge.


3. Check the quality of the image.

- a) On the **Menu** bar, select **View→Display Performance**.
- b) Verify that **Typical Display** is chosen.



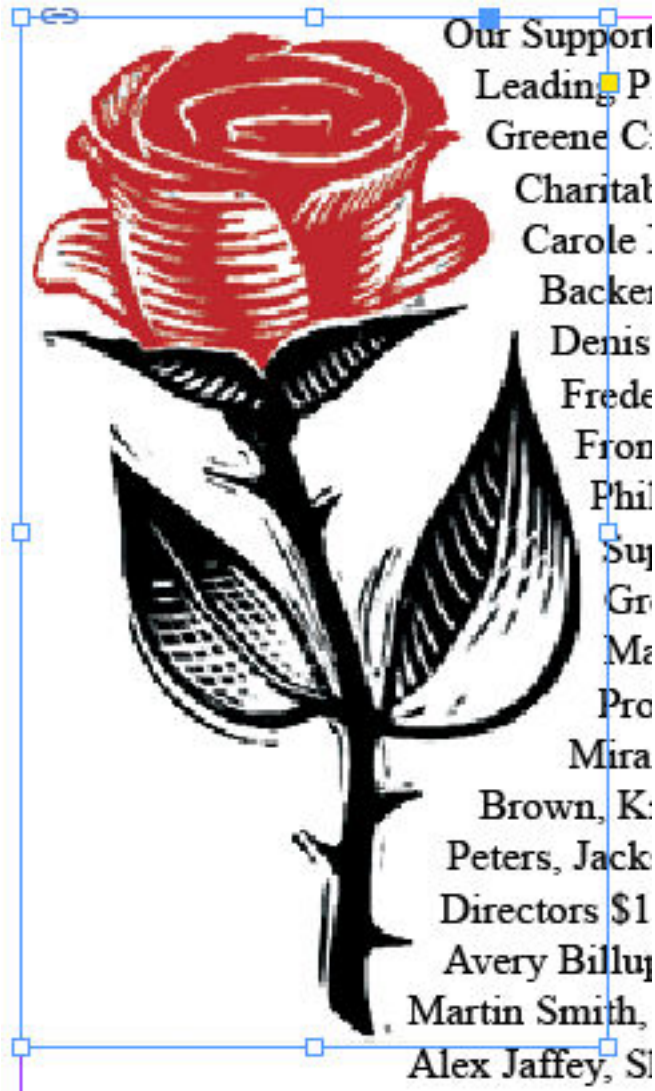
Note: To close the fly-out menu, click off it.

4. Wrap the text around the image.

- a) On the **Menu** bar, select **Window→Text Wrap**.
- b) Verify the image is still selected.
- c) In the **Text Wrap** panel, select the **Wrap around object shape** button. 
- d) In the **Top Offset** field, type **0.125 in**
- e) From the **Wrap To** drop-down list, select **Right Side**.
- f) From the **Type** drop-down list, select **Detect Edges**.
- g) Verify that the text wraps around the right edge of the image.
- h) Close the **Text Wrap** panel.

5. Preview the text wrap effect.

- a) Select **View→Screen Mode→Preview**.



- b) After you've finished previewing the text wrap effect, change the view back to normal by selecting **View→Screen Mode→Normal**.

6. Save and close the file.

Summary

In this lesson, you created a new document and saved a custom preset for later projects. You also learned the various ways to add text to a document. You enhanced the document by placing graphics and wrapping the text around them. InDesign offers many options to customize these basic elements of document design.

Can you think of an InDesign preset that would be helpful to your workflow?

Are there some ways in which the Text Wrap feature would come in handy?



Note: Check your CHOICE Course screen for opportunities to interact with your classmates, peers, and the larger CHOICE online community about the topics covered in this course or other topics you are interested in. From the Course screen you can also access available resources for a more continuous learning experience.

3

Customizing a Document

Lesson Time: 1 hour

Lesson Introduction

You've created the basic elements of a document by adding text and graphics, but there are so many more details you can add to really set your document apart. In this lesson, you will customize a document.

You will use color in text and graphics to increase appeal. You'll fine tune the text by using character and paragraph settings to raise your project to the next level. You will also develop styles and apply them throughout the document for consistency and a more professional look.

Lesson Objectives

In this lesson, you will:

- Format characters and paragraphs.
- Apply colors, swatches, and gradients.
- Create and apply styles.






TOPIC A

Format Characters and Paragraphs

Now that the text is added to your document, you can define different styles to parts of the text such as the headlines, body text, and captions. Adobe® InDesign® (2020) gives you the tools to make your text look consistent and easy to read. In this topic, you will format characters and paragraphs in a document.

Selection Tools

InDesign offers a number of selection tools that make it easy to work with objects and pages, manipulating shape, size, and spacing.

Tool	Allow You To
Selection tool 	Select an entire object.
Direct Selection tool 	Select points on a path or contents that lie within a frame.
Page tool 	Create more than one page size within the same document.
Gap tool 	Change the space between objects.
Content Collector tool 	Load multiple content objects into a "conveyor" so that they can be quickly placed in other locations or even another InDesign document.

Character Formatting Attributes

Character formatting attributes are specified for a text character and can be added to a style. When a character style is created from existing text, attributes that are applied to the selected text become part of the newly created style. Not all of the attributes carry over, however. Font family and size will transfer but the other character attributes are ignored.

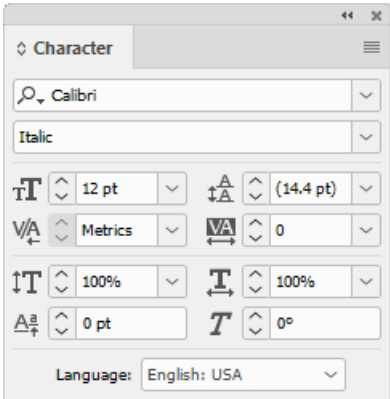



Figure 3–1: The Character panel.

Variable Fonts

A new OpenType font format, *variable font*, is available for some fonts. If it is a variable font, the  icon is displayed next to the font name in the **Font** list. To adjust the attributes on a variable

font, use the **Variable Font** button available on the **Control**, **Character**, **Properties**, **Character Styles**, or **Paragraph Styles** panels.

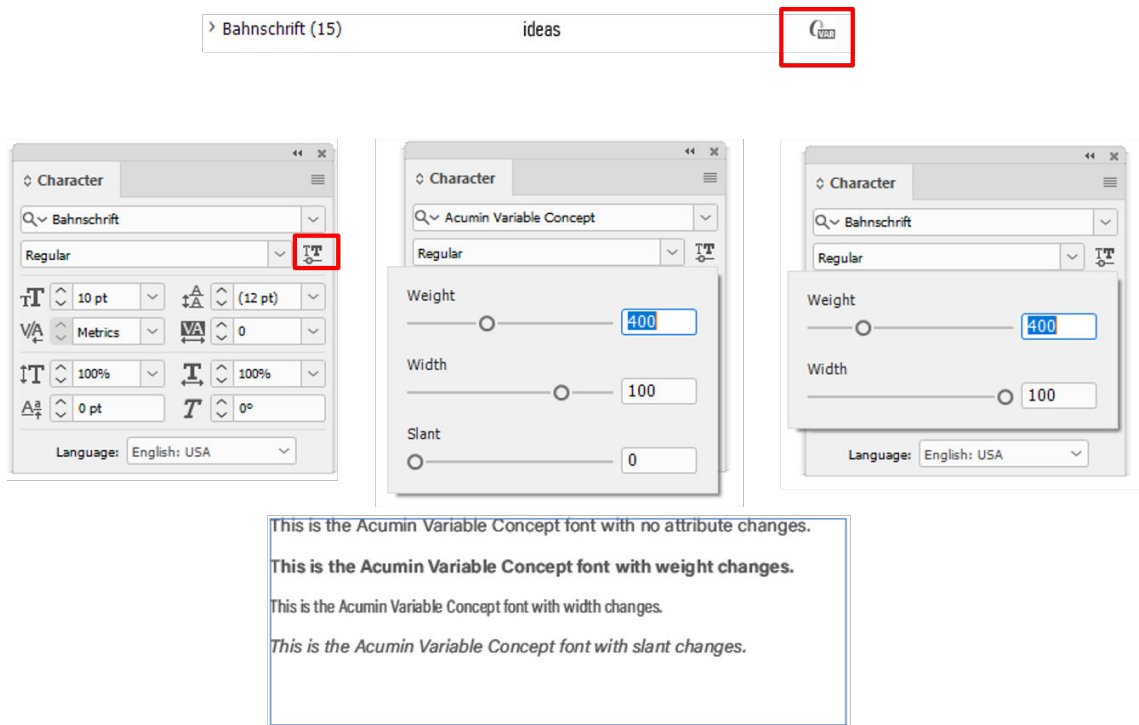


Figure 3–2: Variable font attributes change how the text appears.

Paragraph Formatting Attributes

InDesign offers a variety of paragraph formatting options.

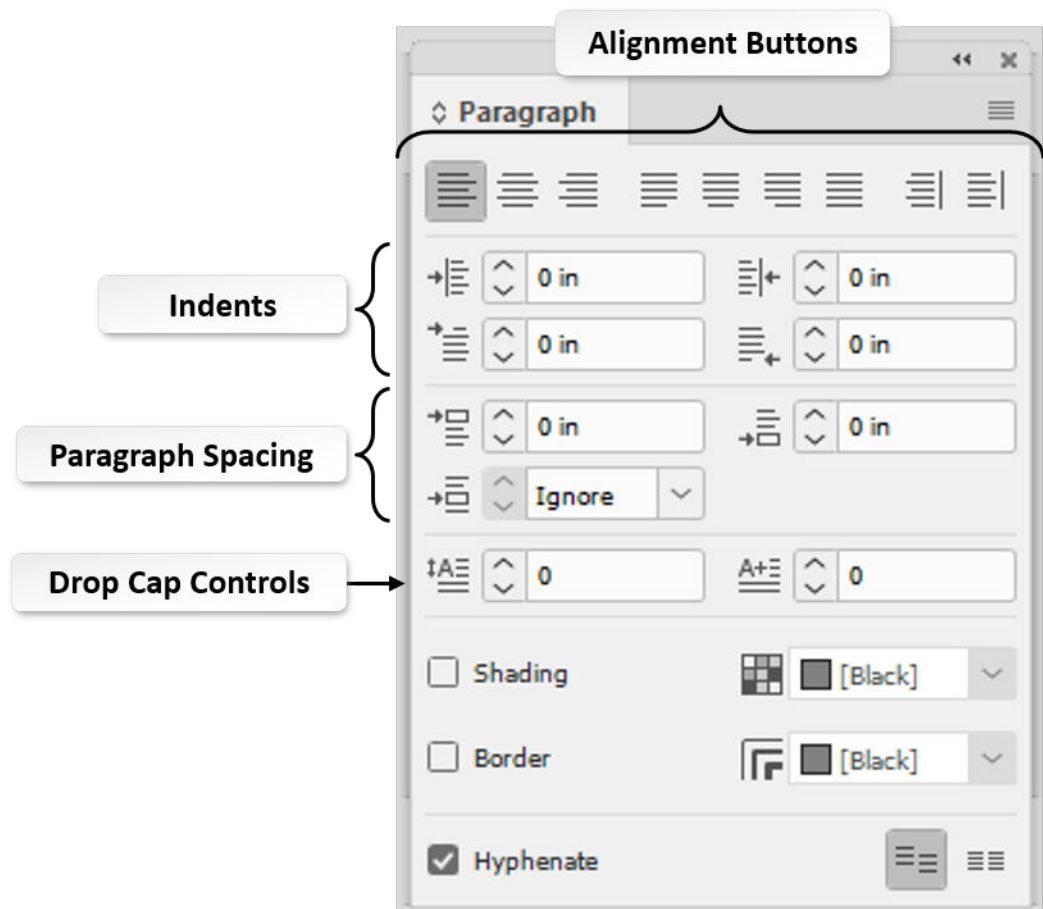


Figure 3–3: The Paragraph panel.

Option	Use To
Alignment buttons	Align text with the left, right, or both edges of a text frame. You can align text by using the various alignment buttons.
Indents	Move text inward from the left and right edges of a frame. You can set indents by using the Left Indent , First Line Left Indent , Right Indent , and Last Line Right Indent fields.
Paragraph Spacing	Add space before or after paragraphs by using paragraph spacing instead of typing an extra paragraph break between paragraphs. The amount of the space between paragraphs can be controlled by using the Space Before , Space After , or Space Between Paragraphs Using Same Style fields.
Drop Cap Controls	Position the baseline of the first letter or word one or more lines below the baseline of the first line of the paragraph. You can specify the number of lines that the drop cap will go below the first line.
Shading	Apply a particular shade of color behind a paragraph.
Border	Create a border around one or more paragraphs.

Hanging Indents

In a hanging indent, the first line of a paragraph is positioned to the left of other lines in the same paragraph. An example of this would be the typical way you format bulleted or numbered paragraphs. A hanging indent is used to align the lines of text to the right of the bullet or number in a list.

Optical Margin Alignment

Punctuation marks and certain letters such as "W" and "A" can make the left or right edge of a text frame appear misaligned. The punctuation marks and the edges of letters can be made to hang outside the text margins by checking the **Optical Margin Alignment** check box in the **Story** panel.

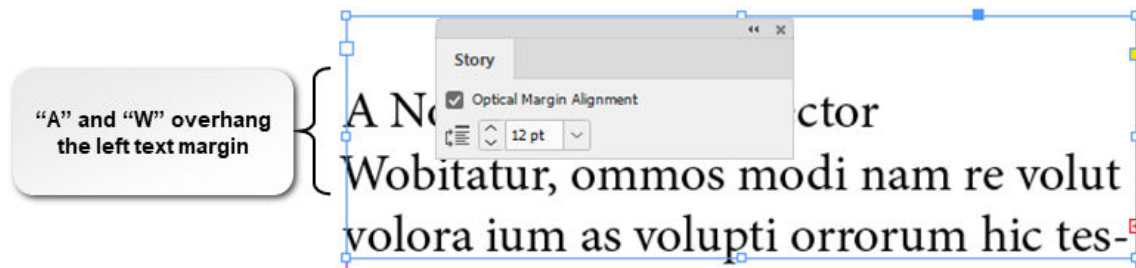


Figure 3-4: An example of the Optical Margin Alignment feature.

OpenType Fonts

OpenType fonts use a single font file for both Windows® and Macintosh® computers, so you can move files from one platform to another without worrying about font substitution and other problems that cause text to reflow. They include a number of features, such as swashes and discretionary ligatures, that aren't available in PostScript and TrueType fonts. Use the **Character** panel or **Control** panel to apply OpenType font attributes, such as fractions and swashes, to text.

Adobe Fonts

Adobe® Fonts® (formerly known as Typekit®) is an online service that allows subscribers to embed fonts into web documents, making them appear closer to print fonts. The service is a part of your Adobe® Creative Cloud® subscription. There are thousands of options currently available in Adobe Fonts. InDesign can now find missing fonts for you. This reduces the headache of working with a document with missing fonts. Previously, you would use the Creative Cloud desktop app to sync Typekit fonts onto your computer. Now, you can browse and select them directly from within InDesign. From the **Font** drop-down menu, select the **Find More** tab to browse through an extensive list of available fonts. If you find a font in the list that you like, you can select the **Activate** icon to add it to your project. You can also show a list of similar fonts or add the font to your list of favorites.

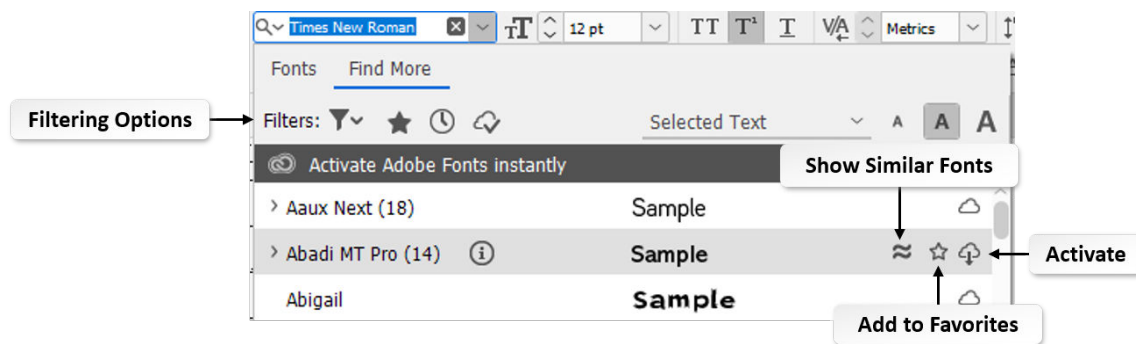


Figure 3-5: The Find More tab in the Fonts list.

Font Search and Filter

A new enhancement to InDesign is the ability to filter your fonts. From the **Fonts** drop-down menu, a set of filtering options is provided. You can filter the fonts by classification, show a list of favorite fonts, show recently added fonts, and show activated fonts.

Rules

Rules are lines that appear either above or below paragraphs. They are used to separate the heading and the body text of a document. Rules move with a paragraph similar to the way text flows inside a frame. You can format a rule's weight, type, color, offset, and indent. The width of a rule is determined by the column width.

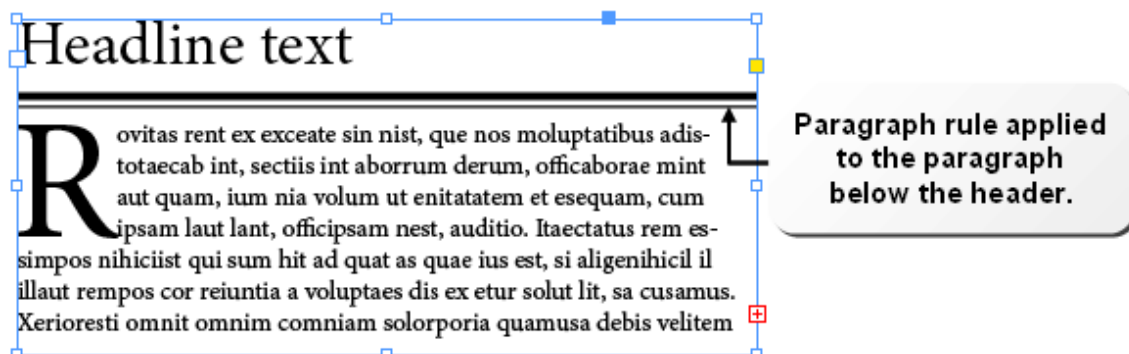


Figure 3-6: Example of a paragraph rule.

Column Rules

For documents containing multiple columns, you might want to add rule lines between the columns. These rules allow you to add style and design elements to your document.

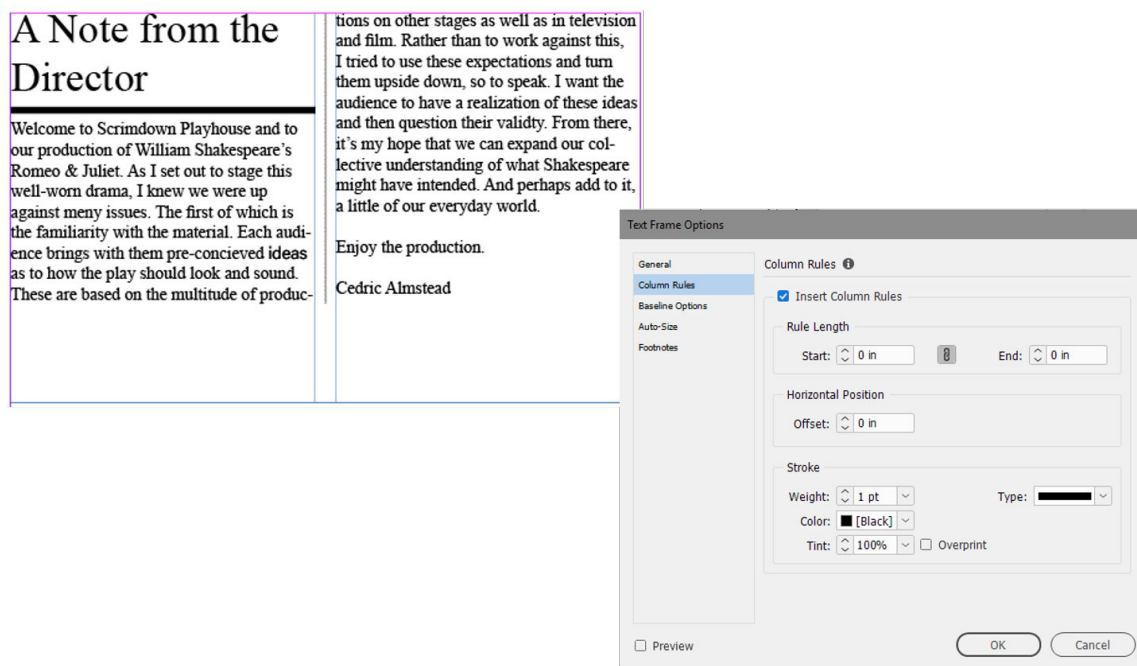


Figure 3-7: An example of a column rule between columns.

Lists

Lists are used to present information separately from the surrounding text. InDesign allows you to create two types of lists: a bulleted list used to indicate a group of equally significant items, and a **numbered list** used to indicate a ranking or a sequence that must be followed to achieve a desired outcome.

Newsletter:

- Came out late because received items late.
- Some items sent in but did not show up in the letter.
- Different headers in the new one for the AM/PM nursery.

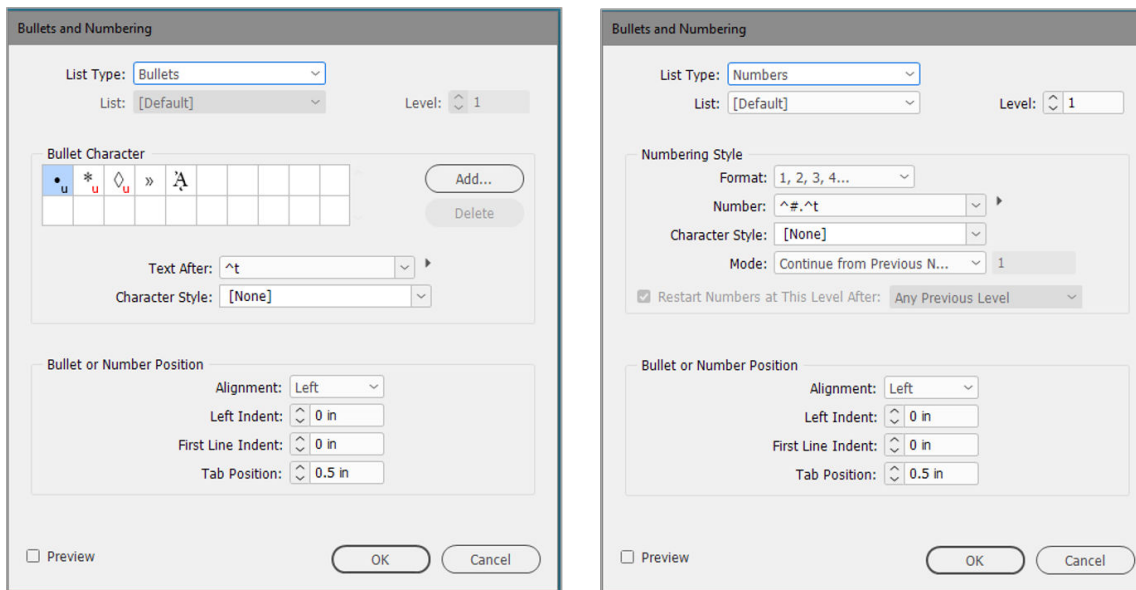
Website:

- Problems getting the snack calendar out-They are not far enough ahead, they should be at least a month ahead.
- Hard copy is up.
- Calendars are confusing and they will be fixed.
- Tours are on Tuesday but we are thinking of adding more.

Figure 3-8: Lists.

The Bullets and Numbering Dialog Box

The **Bullets and Numbering** dialog box provides you with options to create bulleted and numbered lists. The type of list to be created or applied to text in a document can be selected from the **List Type** drop-down list. The bullet character type, the numbering format, and the position of the bullets and numbers can also be defined.

*Figure 3-9: Bullets and Numbering dialog box.*

Paragraph Composer

InDesign offers the ability to ensure that your document is typeset properly. With the Paragraph Composer feature enabled, you can easily ensure that the overall quality of text is good. The Paragraph Composer will analyze multiple lines of text and fix aesthetic problems, ensuring there are no orphans, widows, or text rivers and that there are no issues with hyphenation.

<i>Problem</i>	<i>Description</i>
Orphan	When there are only one or two words in the first line at the top of a page or column.
Widow	When there are only one or two words in the last line of a paragraph.
Text River	When there are areas of white space that run vertically through the body of the text.
Hyphenation	When there is hyphenation in a widow or in more than two consecutive lines in the text.



Access the Checklist tile on your CHOICE Course screen for reference information and job aids on **How to Format Characters and Paragraphs**.

ACTIVITY 3–1

Formatting Characters and Paragraphs

Data File

C:\092023Data\Customizing a Document\Playbill Lesson 3.indd


Scenario

You have set up your playbill document and imported text and graphics. You decide to change the default character and paragraph formatting to match the specifications in the style guide that you developed for Scrimdown Playhouse.

1. Open Playbill Lesson 3.

- From the **C:\092023Data\Customizing a Document** folder, open the **Playbill Lesson 3.indd** file.
- If prompted to update links, select **Update Modified Links**.
- From the **Menu** bar, select **View→Fit Page in Window**.


2. Apply paragraph formatting.

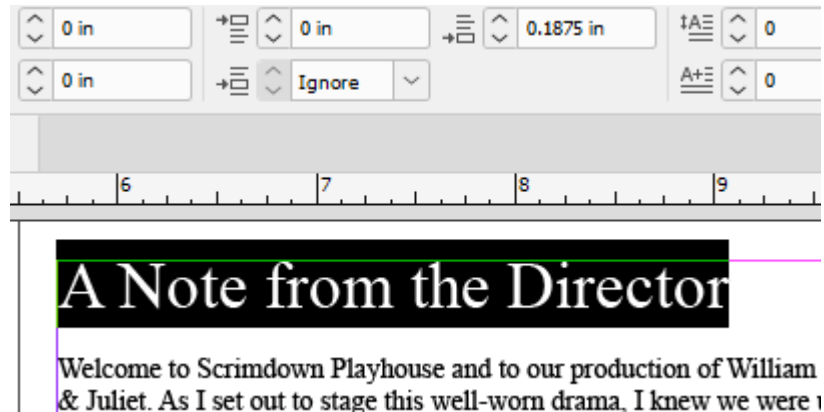
- From the **Page Selector** drop-down list at the bottom of the document window, select **3**.
- In the **Tools** panel, if necessary, select the **Text** tool. 
- Click inside the text box "A Note from the Director."
- Select **Edit→Select All**.
Only the text in the current text box is selected.
- In the **Control** panel, from the **Font** drop-down box, select **Times New Roman**.
- In the **Font Size** box, type **10** and press **Enter**.
- Select the text "A Note from the Director."
- In the **Control** panel, in the **Font Size** box, type **24** and press **Enter**.
- With the headline "A Note from the Director" selected, in the **Control** panel, select the **Paragraph**



Formatting Controls button. 



Note: The **Paragraph Formatting Controls** button toggles with the **Character Formatting Controls** button above it.

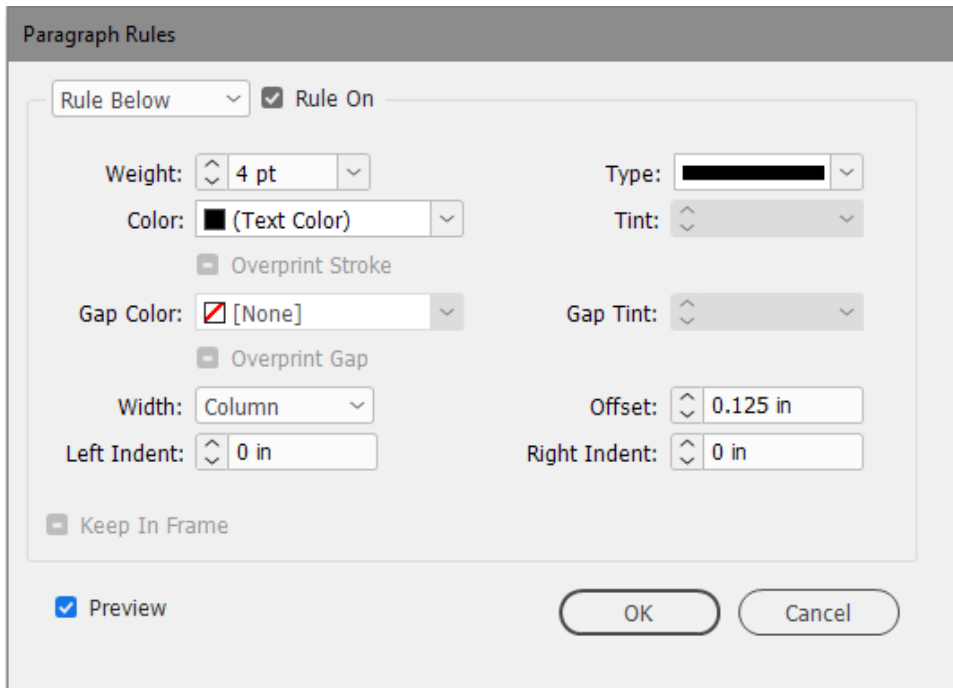
- j) In the **Space After** box  type **0.1875** and press **Enter**. Observe that the title now has a space separating it from the message.



3. Add a paragraph rule.
- Select **Window→Type & Tables→Paragraph**.
 - With the **Text** tool , select in the headline "A Note from the Director."
 - From the **Paragraph** panel options menu , select **Paragraph Rules**.

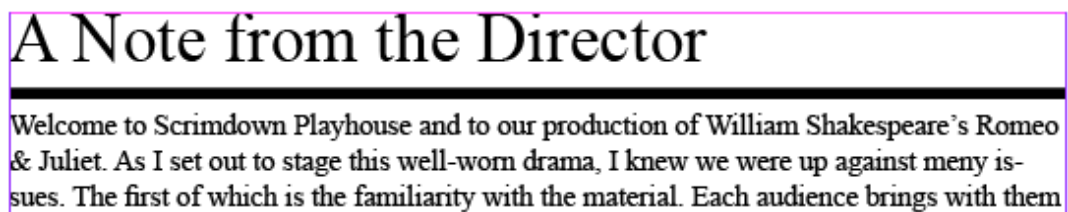
d) Set the **Paragraph Rules** options.

1. From the **Rule Above/Rule Below** drop-down box, select **Rule Below** and check the **Rule On** check box to enable it.
2. From the **Weight** drop-down box, select **4pt**.
3. From the **Color** drop-down box, select **[Black]**.
4. From the **Type** drop-down box, verify that the setting is **Solid**.
5. From the **Width** drop-down box, verify that the setting is **Column**.
6. In the **Offset** box, select the value and type **0.125**
7. Check the **Preview** check box to enable it.



8. Select **OK**.

Observe the effect your formatting has on the director's note. Notice that the title stands out from the text.



4. Save the file as ***My Playbill Lesson 3.indd***

TOPIC B

Apply Colors, Swatches, and Gradients

You formatted text to make the document more appealing to read. Another way to enhance the document is through the use of colors and gradients in the text and other elements. In this topic, you will apply colors, swatches, and gradients.

Fills

A **fill** is a background color used within a graphic or a text placeholder. A fill can be a solid color or a gradient.

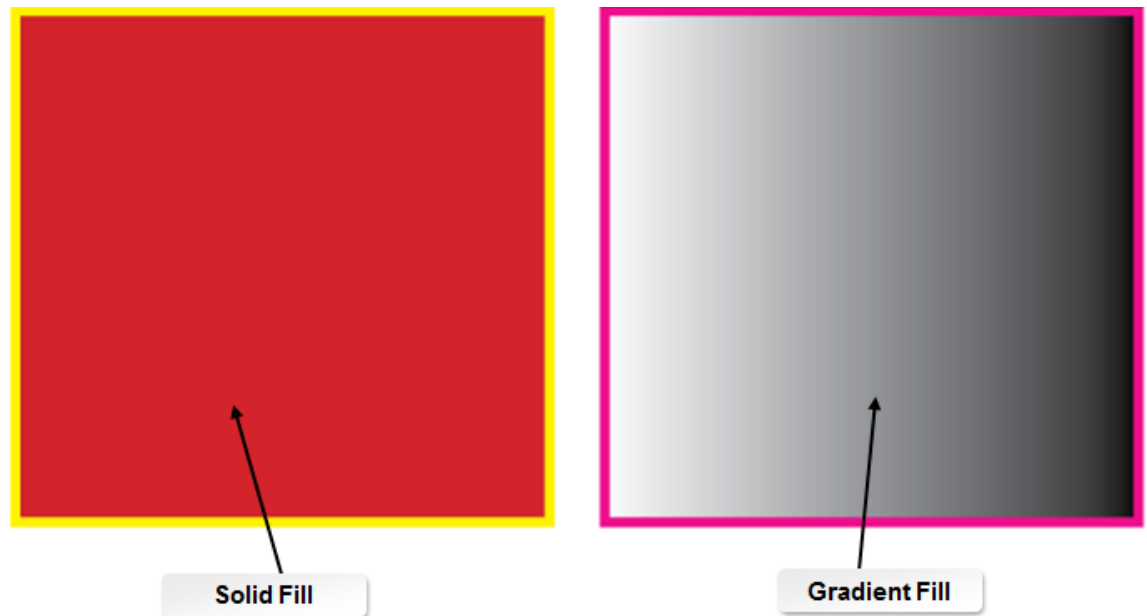


Figure 3-10: Fills.

Strokes

A **stroke** is the line that acts as the outer perimeter of a graphic or text frame. Strokes can take many shapes, including solid or dashed lines, wavy lines, slanted lines, and dots. You can control the weight and appearance of a stroke.

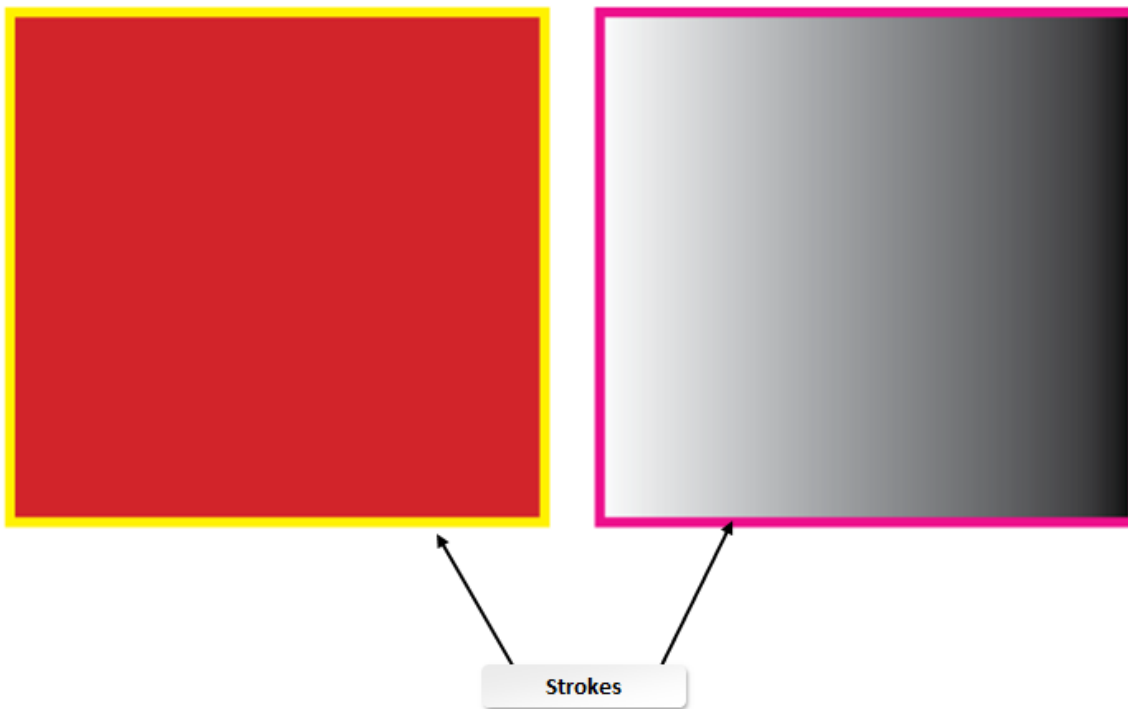


Figure 3-11: Strokes.

The Stroke Panel

The **Stroke** panel is used to apply a stroke to an object. You can use this panel to specify the width and appearance of the stroke. You can also specify the stroke style, width, start and end shapes, and position relative to the object's path.

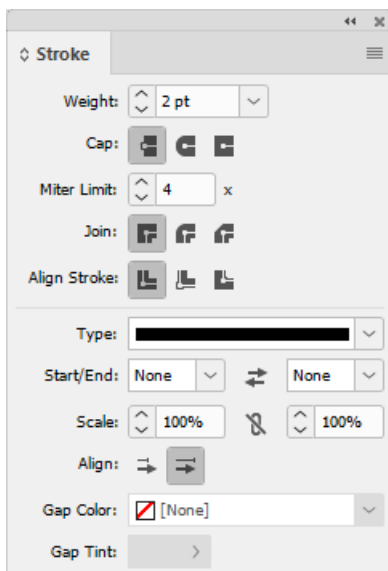


Figure 3-12: The Stroke panel.

Process Colors

Process colors are defined by combining different tints to produce the required shade. There are three basic color models: RGB, CMYK, and Lab.

<i>Color Model</i>	<i>Description</i>
RGB	Defines colors by their red, green, and blue components. RGB is typically used for defining colors displayed on screen because these are the phosphor colors used in monitors.
CMYK	Creates colors by combining percentages of cyan, magenta, yellow, and black. It is the standard process color for print because of their use in printing presses.
Lab	Builds colors by combining a luminance (brightness) component and two chromatic components (green-to-red balance and blue-to-yellow balance). Lab color is typically used for displaying colors on a monitor and in color-management software because it has a wide gamut and is not based on any specific device.



Process Colors and Printing

The RGB and Lab color models can create much brighter colors than the CMYK color model because CMYK has a narrower gamut or range of reproducible colors. If you are choosing colors that will be viewed on screen, such as for distribution to the web, then you can safely use the RGB and Lab models. If you intend to print your document, it's best to use CMYK. If you select a Lab or RGB color that is not reproducible by the CMYK color model, the **Color** panel displays an exclamation point, representing an out-of-gamut warning. To fix this, you can select the exclamation point to revert the color to the closest CMYK approximation.

Spot Colors

A **spot color** is printed from one premixed ink and can reproduce colors that are outside the gamut of process colors. Spot colors are used when there is a need to reproduce a specific color accurately and consistently, such as when you're printing a company's logo. Spot colors can be selected from printed swatch books such as the PANTONE® Formula Guide. This will give you the closest representation of how the printed color will look.

The Eyedropper Tool

Use the **Eyedropper** tool  to copy fill and stroke attributes, such as color, from any object in an InDesign file, including an imported graphic. By default, the **Eyedropper** tool loads all available fill and stroke attributes of an object and sets the default fill and stroke attributes of any new objects that you draw. When the **Eyedropper** tool has picked up attributes, it changes its appearance. 

Double-click the **Eyedropper** tool to access the **Eyedropper Options** dialog box. You can use the **Eyedropper Options** dialog box to change the attributes that the **Eyedropper** tool copies. You can also use the **Eyedropper** tool to copy type and transparency attributes.

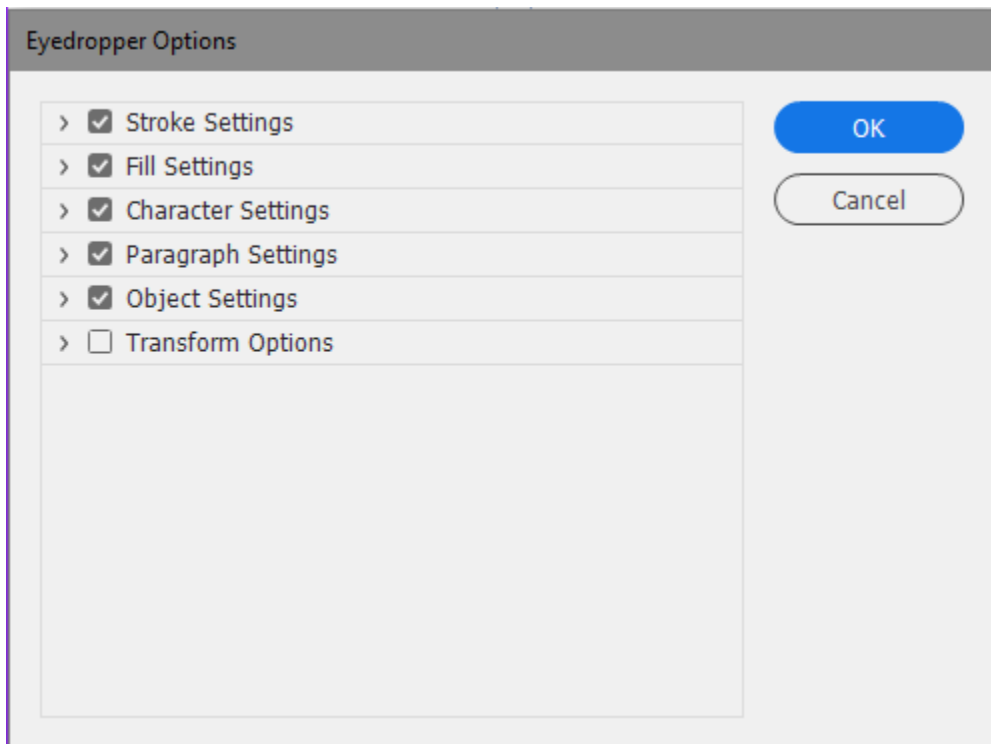


Figure 3-13: The Eyedropper Options dialog box.

	Note: If the Color Theme Tool is shown instead of the Eyedropper tool, right-click the Color Theme Tool and then select the Eyedropper Tool .
	Note: If an attribute is not listed in the Eyedropper Options dialog box, it can't be copied with the Eyedropper tool.

The Color Panel

The **Color** panel is used to define colors by using one of the three process color models: RGB, CMYK, and Lab. The colors defined by using the **Color** panel can be added to the **Swatches** panel. You can use the color panel to apply colors to grayscale and bitmap images, and strokes. This panel is useful in creating custom colors.

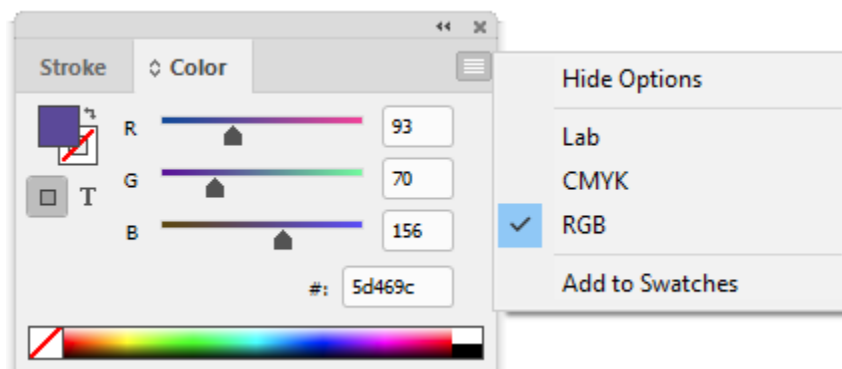


Figure 3-14: The Color panel with the Panel menu open.

PANTONE Colors

PANTONE® is a company that created a standardized color matching system that most of the industry has adopted. Using the PANTONE numbering system, different manufacturers can make sure their colors match. They do not need to have any direct contact with one another to have this compatibility. The PANTONE solids palette contains the most commonly referenced colors. It consists of 1,114 colors. Each has a three or four digit number, followed by a C (Coated Paper), U (Uncoated Paper), or M (Matte Paper) suffix. The colors are identical, but target different paper types.

In the InDesign interface, you can add PANTONE colors to your swatches library by creating a new color swatch and assigning a PANTONE color to it in **Swatch Options**.

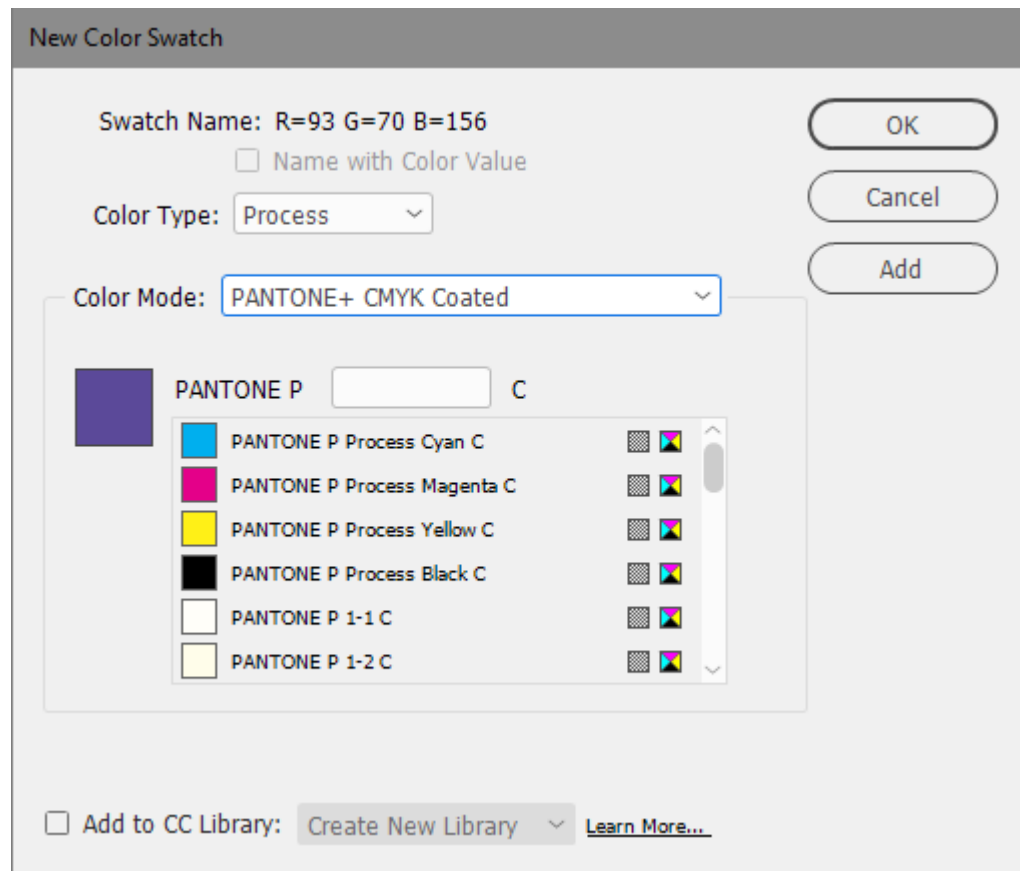


Figure 3–15: Choosing a PANTONE color in Swatch Options.

The Color Picker

The **Color Picker** lets you choose precise colors easily while also displaying the settings in RGB, CMYK, and Lab values. The settings describe the color by using the various color modes. To pick and mix colors, select them using the color spectrum or specify the colors numerically.

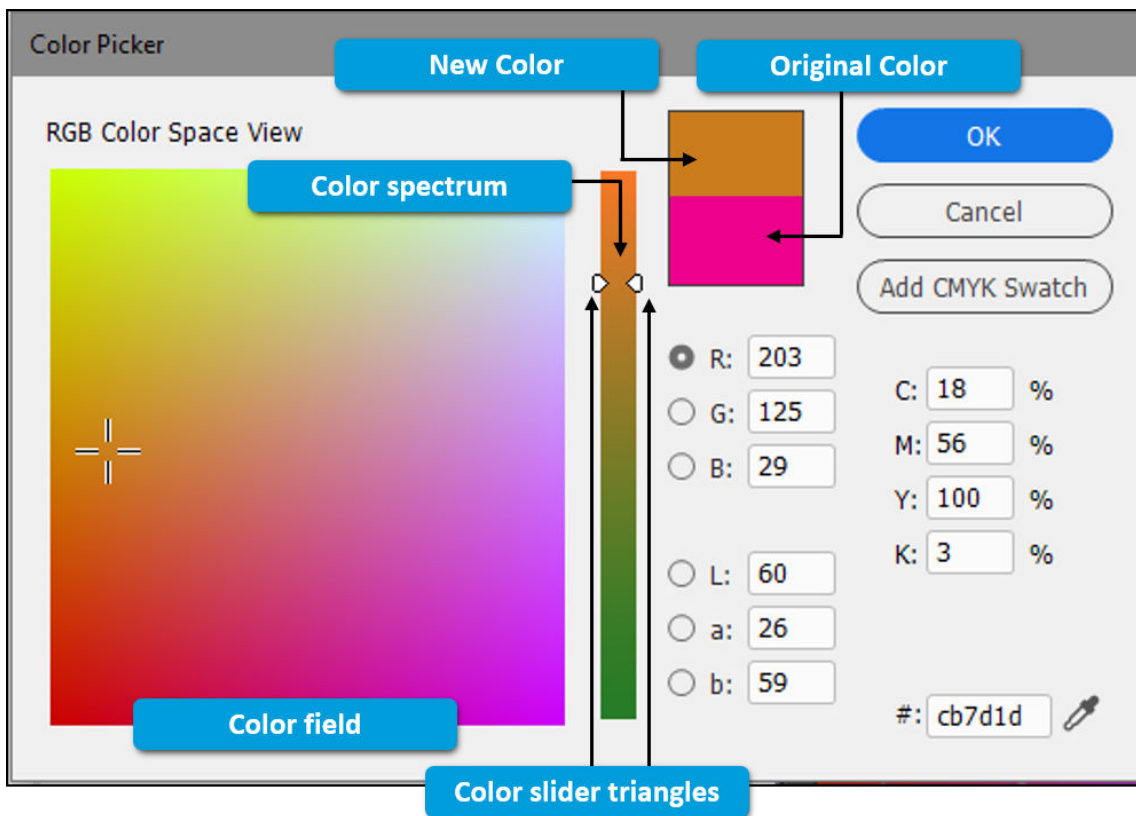


Figure 3-16: The Color Picker.

Component	Description
New color	Displays the color currently represented in the color spectrum.
Original color	Displays the original color selected from the color spectrum.
Color spectrum	Enables you to select and view colors from a range set according to the color slider.
Color slider triangles	Controls precision color selection in the color slider by moving the triangles left or right.

Swatches

A **swatch** is a stored color, gradient, or tint definition that can be applied to any element that requires color, gradient, or tint. Swatches provide consistent and flexible definitions that allow you to define a color, gradient, or tint once and reuse it throughout a document. When you redefine a swatch, the elements to which you applied the swatch will change to match the new swatch settings.

The Swatches Panel and Swatch Library

The **Swatches** panel displays swatches that can be used to apply color to objects in an InDesign document. The panel displays sets of predefined swatches and also lets you create color swatches. Swatches that you create are available only for the document which is open when the swatch is created. Each document can have its own set of swatches, which are available in the **Swatches** panel.

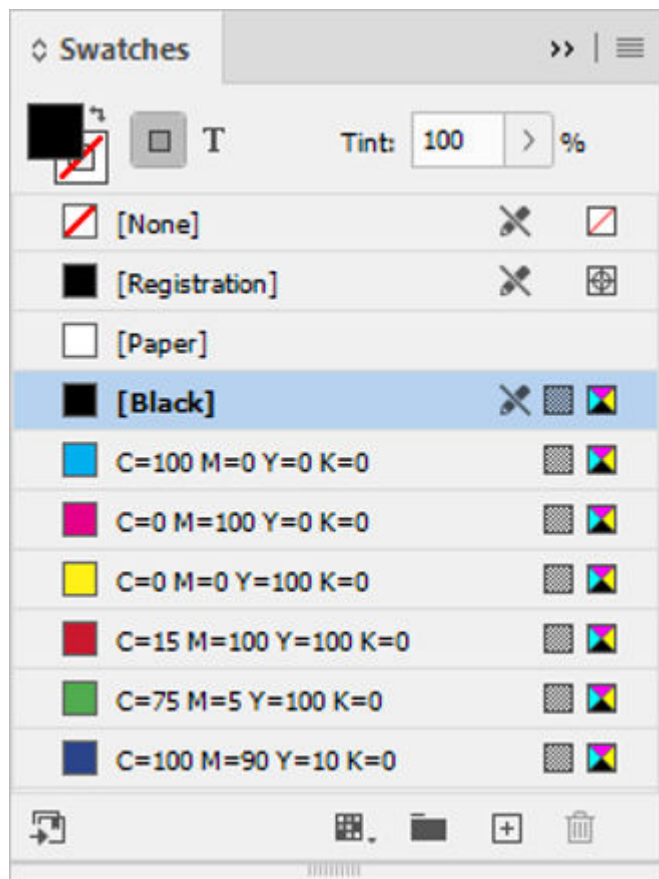


Figure 3–17: The Swatches panel.

Tint Swatches

Tints are percentage variations of colors that you define as swatches. You can easily modify either the original color swatch on which the tint is based or the tint itself, and all the items in the document that use the tint will reflect the change.



Note: Using named swatches to define and apply colors allows you to consistently use the same colors across a document. When you need to change a color, editing the swatch will allow you to change all instances to which a particular color has been applied, avoiding tedious extra work.

Swatch Library

Another option when you want color swatches, but do not want to create your own, is to use the swatch libraries from other color systems. The most commonly used in North America are PANTONE and TRUMATCH®, which are generally used by printers. A complete list of swatch libraries includes:

- PANTONE
- TRUMATCH
- ANPA (used for newspapers)
- DIC (used in Japan)
- Focoltone® (used in Great Britain and France)
- HKS® (used in Europe)
- System (designed for Mac OS or Windows)
- Toyo (used in Japan)
- Web

Mixed Inks

A *mixed ink* is a mixture of two spot colors or a spot color with one or more process colors. Mixing inks allows you to print a number of colors with fewer inks. You can create a single mixed ink or a mixed ink group. A mixed ink group is used to generate multiple swatches at one time, and contains a series of colors created from incremental percentages of different spot and process colors. You can convert mixed inks to process colors to reduce the cost of printing. A minimum of one spot color must be added to the **Swatches** panel before creating a mixed ink.

Gradients

A *gradient* is a graduated blend between two or more colors or between two tints of the same color. Gradients can be created and displayed either linearly or radially. Gradient effects are useful in creating depth and shadows.

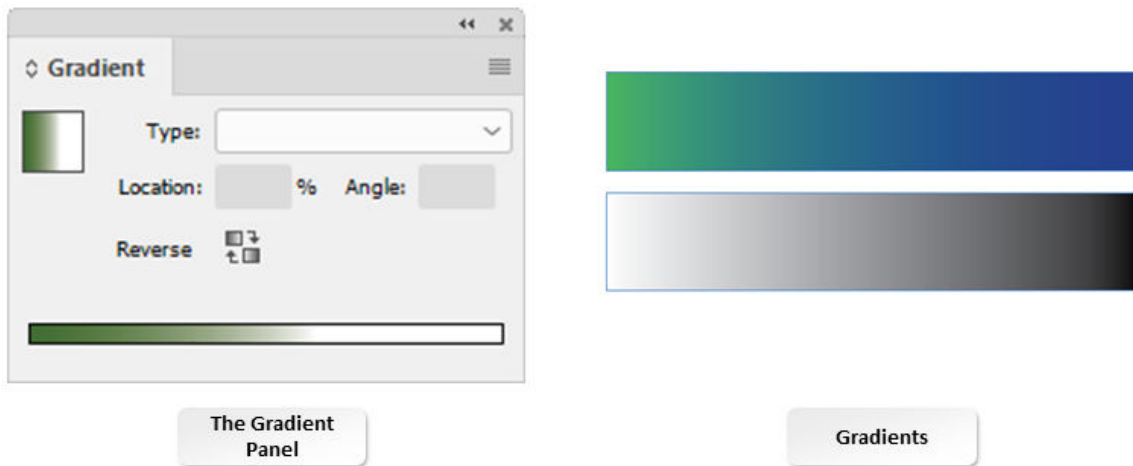


Figure 3-18: Gradients.

	<p>Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Apply Colors, Swatches, and Gradients.</p>
---	---

ACTIVITY 3–2

Applying Colors, Swatches, and Gradients

Data File

C:\092023Data\Customizing a Document\My Playbill Lesson 3.indd


Before You Begin

My Playbill Lesson 3.indd is open.

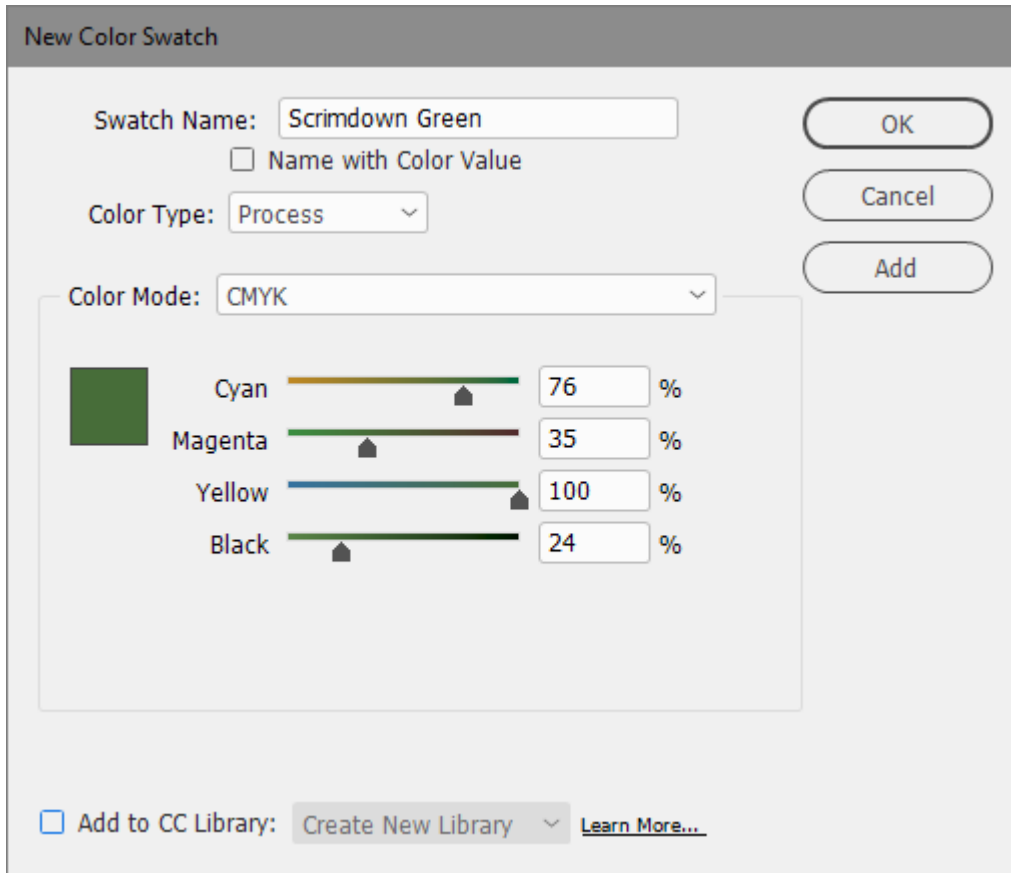
Scenario

The playbill layout is coming along. You'd like to introduce color to some of the text elements and create swatches for consistency. You also need to follow the Scrimdown Playhouse style guide and use the proper green from their logo.

1. Create a color swatch.

- a) Select **Window→Color→Swatches** to open the **Swatches** panel.
- b) From the **Swatches** panel options menu  select **New Color Swatch**.
- c) In the **New Color Swatch** dialog box, uncheck the **Name with Color Value** check box to enable the **Swatch Name** box, and in the **Swatch Name** box, type *Scrimdown Green*
- d) In the **Color Type** drop-down list, verify that **Process** is selected.
- e) In the **Color Mode** drop-down list, verify that **CMYK** is selected.
- f) In the **Cyan** field, type *76* and press **Tab**.
- g) In the **Magenta** field, type *35* and press **Tab**.
- h) In the **Yellow** field, type *100* and press **Tab**.

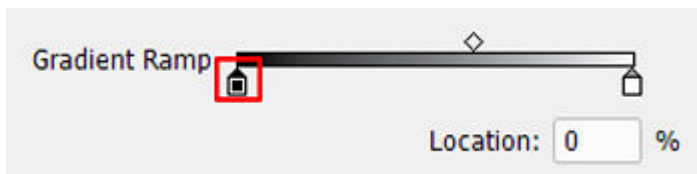
- i) In the **Black** field, type **24**



- j) Select **OK**.

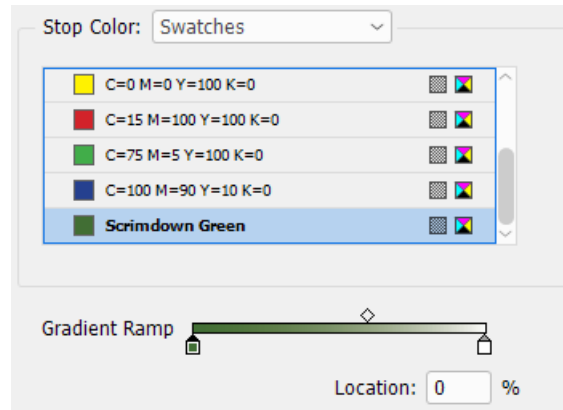
2. Create a gradient color swatch.

- From the **Swatches** panel options menu, select **New Gradient Swatch**.
- In the **New Gradient Swatch** dialog box, in the **Swatch Name** box, type **Green Fade**
- From the **Type** drop-down list, verify that **Linear** is selected.
- On the **Gradient Ramp** color bar, select the left color stop to enable the other options in the dialog box.



- e) From the **Stop Color** drop-down list, select **Swatches**.

- f) In the **Swatches** list, select **Scrimdown Green**.



- g) In the **Gradient Ramp** color bar, select the right color stop.
 h) In the **Swatches** list, verify that **[Paper]** is selected.
 i) In the **Location** field, select the value and type **60**
 j) Select **OK**.

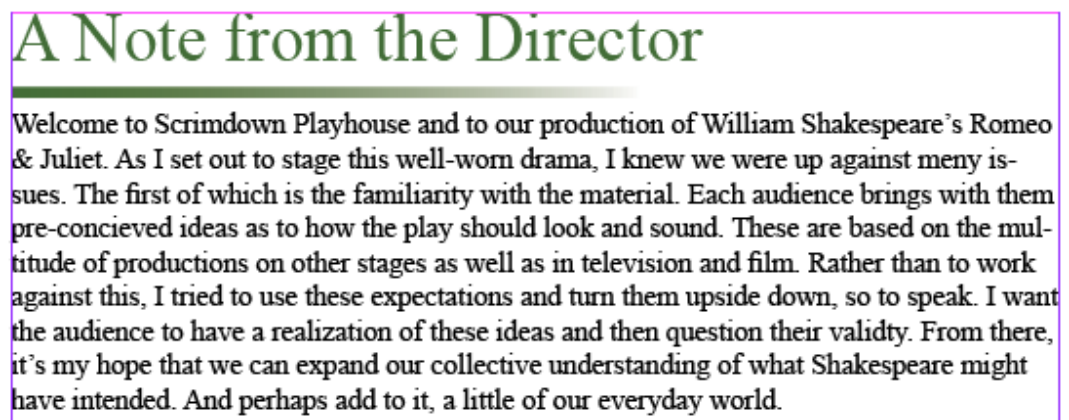
3. Apply color to text.

- a) Verify that page **3** is selected and then, if necessary, select the **Type** tool.
 b) In the text frame, select the headline "A Note from the Director."
 c) In the **Swatches** panel, from the **Color** list box, scroll down and select **Scrimdown Green**.
 d) Click outside the border of the document to deselect the text and view the applied color.
 e) Collapse the **Swatches** panel.

4. Apply a gradient to a paragraph rule.

- a) With the **Text** tool, click in the headline "A Note from the Director."
 b) Select **Window→Type & Tables→Paragraph** to open the **Paragraph** panel.
 c) From the **Paragraph** panel options menu, select **Paragraph Rules**.
 d) In the **Paragraph Rules** dialog box, verify that **Rule Below** is selected in the drop-down box, and that the **Rule On** check box is selected.
 e) From the **Color** drop-down list, select the **Green Fade** gradient swatch.
 f) Select **OK** and close the **Paragraph** panel.

Your result should look similar to the following:



- g) Save the file and leave it open.

TOPIC C

Create and Apply Styles

Now that you've formatted characters and paragraphs in a document, you can take advantage of InDesign's styles. Creating and applying paragraph styles to your document will save you formatting time and help you keep a consistent look throughout. In this topic, you will create and apply styles.

Styles

A **style** is a user-specified feature that can be consistently applied across multiple page elements. You can specify a variety of attributes in a single style. Once created, a style can be applied to any page element that accepts it. Styles can be edited anytime, and objects using that style will reflect any changes made to it.

The Paragraph Styles and Character Styles Panels

The **Paragraph Styles** and **Character Styles** panels provide a wide range of formatting attributes that can be created and applied to text. InDesign allows you to import paragraph and character styles from another InDesign document into the active document. A set of related styles can be grouped into separate folders in the **Paragraph Styles** and **Character Styles** panels.

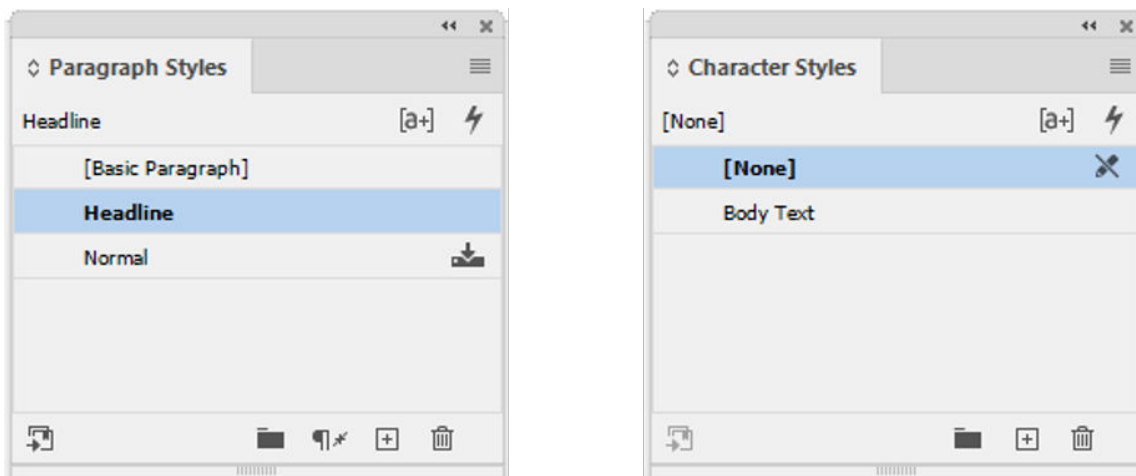


Figure 3-19: Paragraph Styles and Character Styles panels.

The Object Styles Panel

The options in the **Object Styles** panel are used to create, edit, save, and apply object styles to objects in an InDesign document. The **Text Frame** icon in the **Object Styles** panel indicates the default style for text frames, and the **Graphics Frame** icon indicates the default style for graphic frames and drawn shapes.

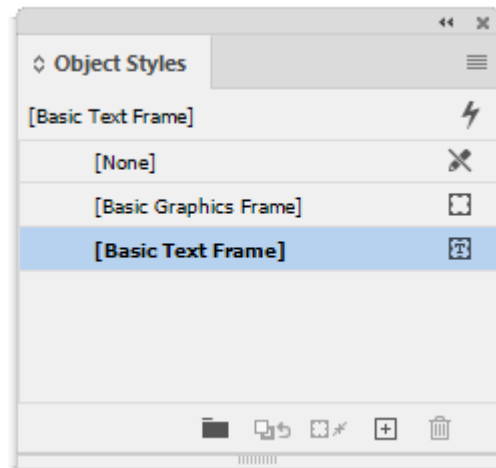


Figure 3–20: The Object Style panel.

Quick Apply

The **Quick Apply** feature prevents you from having to open multiple panels every time you want to apply a style. InDesign gives you the flexibility to quickly and efficiently use any menu command, style, or text variable by typing part of the style name in the **Quick Apply** box. You can narrow down the search to a single category by typing the appropriate prefixes for the menu commands, styles, and text variables.

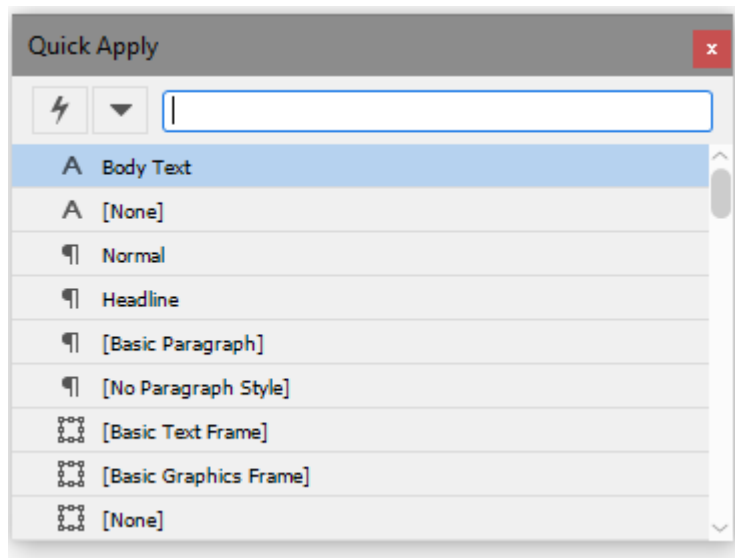


Figure 3–21: The Quick Apply feature.



Note: To learn more about applying styles, check out the Spotlight on **Formatting Using Object Styles** presentation from the **Spotlight** tile on the CHOICE Course screen.



Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Create and Apply Styles.

ACTIVITY 3–3

Creating and Applying Styles

Before You Begin

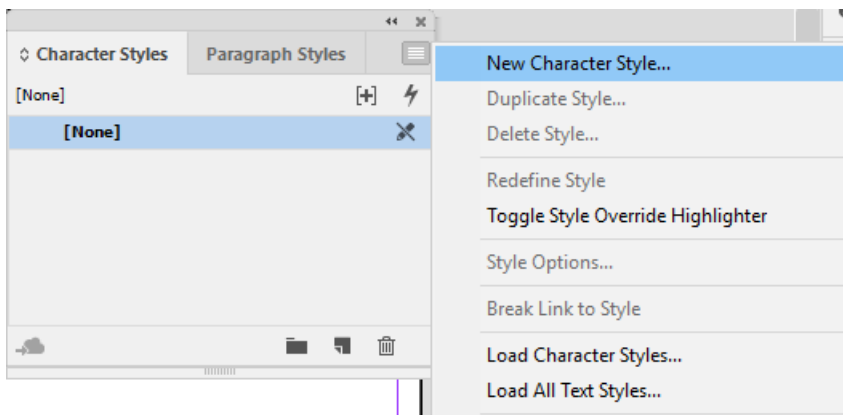
My Playbill Lesson 3.indd is open.

Scenario

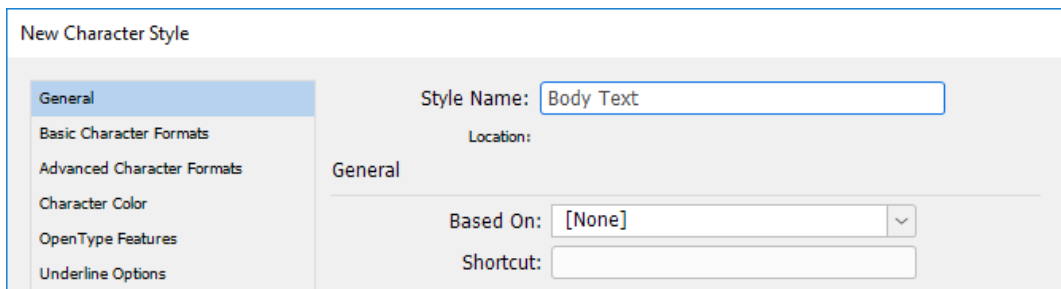
You formatted a paragraph of body text and a headline and you're happy with the results. Now you'd like to create styles based on this formatting so it can be applied throughout the playbill. This will give the document a more cohesive look, and save a lot of extra work.

1. Create character styles.

- Select **Window→Styles→Character Styles** to open the **Character Styles** panel.
- From the **Character Styles** panel options menu, select **New Character Style**.

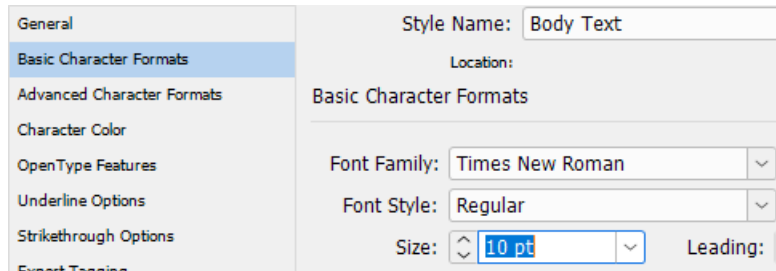


- In the **New Character Style** dialog box, in the **General** category, in the **Style Name** box, type **Body Text**

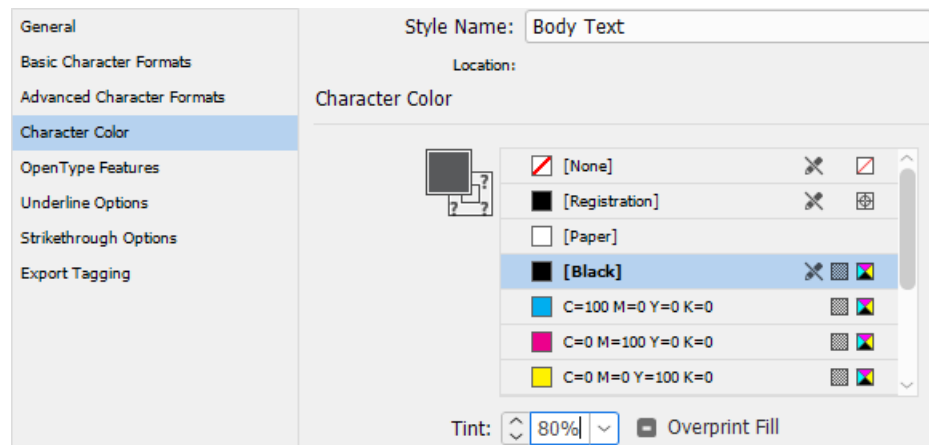


- In the left pane, select the **Basic Character Formats** category.
- In the right pane, in the **Basic Character Formats** section, from the **Font Family** drop-down list, select **Times New Roman**.
- From the **Font Style** drop-down list, verify that **Regular** is selected.

- g) From the **Size** drop-down list, select **10 pt**.



- h) In the left pane, select the **Character Color** category.
 i) In the right pane, in the **Character Color** section, from the list box, select **Black**.
 j) From the **Tint** drop-down list, select **80%**.



- k) Select **OK**.

2. Create a paragraph style based on the formatted text.

- a) If necessary, navigate to page **3** and with the **Text** tool, click in the headline "A Note from the Director."
 b) Select the **Paragraph Styles** panel.
 c) At the bottom of the **Paragraph Styles** panel, select the **Create New Style** button.

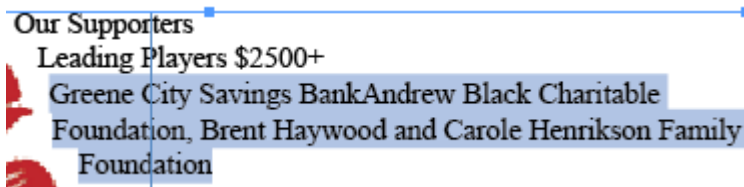


- d) Verify that a new style called **Paragraph Style 1** appears in the list.
 e) Double-click **Paragraph Style 1** to open the **Paragraph Style Options** dialog box.
 f) With **General** selected in the left pane, in the **Style Name** box, change the name to **Headline**
 g) Select **OK**.

3. Apply the new character style to text.

- a) Navigate to page **2**.
 b) Select the **Character Styles** panel.

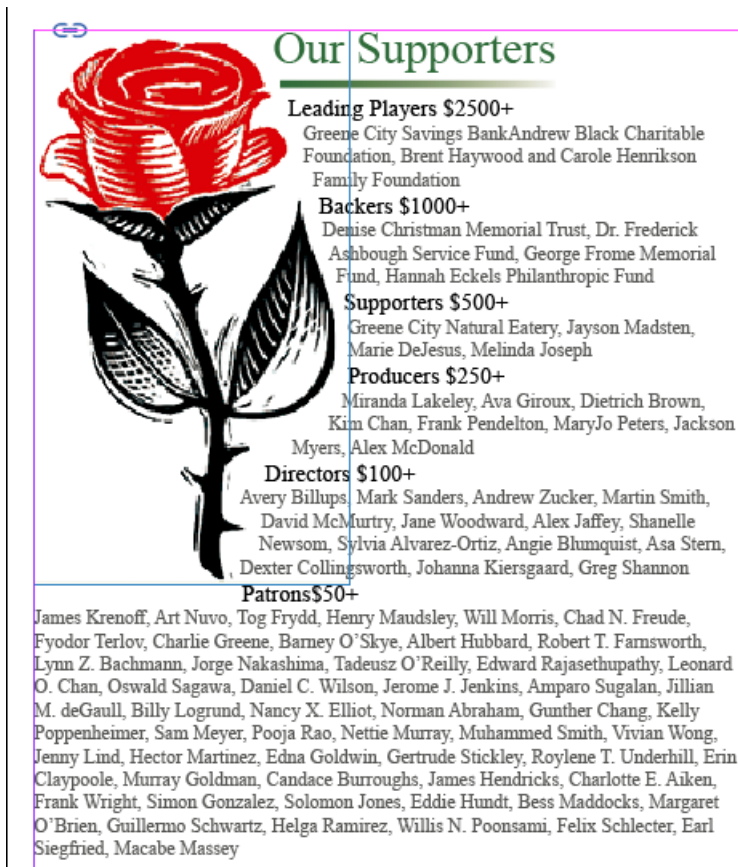
- c) Click four times in the paragraph below the line of text "Leading Players \$2500+" to select the paragraph.



- d) In the **Character Styles** panel, select **Body Text** to apply that style to the selected text.
- e) Continue formatting the page as follows:
- In the paragraph below "Backers \$1000+," apply the **Body Text** character style.
 - In the paragraph below "Supporters \$500+," apply the **Body Text** character style.
 - In the paragraph below "Producers \$250+," apply the **Body Text** character style.
 - In the paragraph below "Directors \$100+," apply the **Body Text** character style.
 - In the paragraph below "Patrons \$50+," apply the **Body Text** character style.

4. Apply the paragraph style to the headline.

- a) Click in the headline "Our Supporters."
- b) Select the **Paragraph Styles** panel.
- c) In the **Paragraph Styles** panel, select the **Headline** style to apply it to the headline text.
- Your page should look similar to the following.



5. Save and close the file.

Summary

In this lesson, you formatted characters and paragraphs. You also enhanced the visual impact of a document by adding colors, swatches, and gradients. In order to work more efficiently, you learned how to save the formatting as reusable character and paragraph styles for use throughout a document.

What are some commonly used elements of a document that could benefit from a style that could be applied to them?

What character formatting will be most useful to you?



Note: Check your CHOICE Course screen for opportunities to interact with your classmates, peers, and the larger CHOICE online community about the topics covered in this course or other topics you are interested in. From the Course screen you can also access available resources for a more continuous learning experience.

4

Working with Page Elements

Lesson Time: 1 hour, 30 minutes

Lesson Introduction

You've learned to create a document that contains formatted text and graphics. You've also introduced colors and gradients for visual interest and developed styles to apply throughout the document. Now it's time to investigate the other tools that Adobe® InDesign® (2020) offers to further enhance documents and aid in your work flow.

Tools for aligning and arranging objects on the page will help you work more efficiently. The layers feature will bring new options to structuring your pages. You will learn more of the many ways InDesign allows you to modify and customize objects. Flowing text in a multiple-page document will be simplified when you learn how to thread text frames. You'll also be able to take advantage of InDesign's extensive tools to proofread and edit your text.

Lesson Objectives

In this lesson, you will:

- Arrange and align objects.
- Use layers.
- Transform and manipulate objects.
- Thread text frames.
- Edit text.

TOPIC A

Arrange and Align Objects

As you begin to lay out the pages of your documents, the precise placement of objects is essential in striking the right look. InDesign gives you tools to make this a snap. In this topic, you will arrange and align objects.

Arrangement Commands

Arrangement commands are used to place numerous elements of an object in a stacked order. The **Bring to Front** and **Send to Back** commands move an object to the front and back of a stack, respectively. The **Bring Forward** and **Send Backward** commands move an object forward and backward incrementally in the stack order.

Stacking Order

Stacking is the grouping of objects. In a stack, overlapping objects are arranged in the order in which they are created or imported. Each named layer has a separate stack of objects, and the arrangement commands control the order only within each named layer. If there are no named layers, a document will contain just one stack of objects on its single default layer. Objects on master pages exist at the back of each named layer. If objects are grouped, the stacking order will change.

Guides

Guides indicate the position of margins and other areas of a page. They can be moved and positioned as needed. Guides are visible on the screen to help align elements on document pages but they do not print.



Figure 4-1: An example of guides in a document window.

There are three types of guides. **Page guides** are visible only on the page on which they are created. **Spread guides** are visible across all pages of a multiple page spread. **Smart guides** snap objects to

items in a layout to create, align, edit, and transform objects relative to other objects. You can set options to specify the type of smart guides and feedback in the **Preferences** dialog box. By default, smart guides are enabled when the InDesign application is launched.



Note: Smart Guides in InDesign are temporary guides that appear when an object is created or moved. These guides allow you to snap objects with other objects in the layout or with page edges. Smart cursors refer to the tooltip that appears when an object is moved or re-sized. It gives users information about the position values or the transformation values of the object.

Guide Position

In order to create manual guides, the ruler needs to be visible. You can drag from the horizontal or vertical ruler to create guide lines. You can also select a guide then enter values in the **Properties** panel to position the guide to an exact location. The X position is measured from the left edge of the page. If you want to measure from the right edge of the page, drag the ruler to reposition the 0 point of the ruler to align with the top right edge of the page. When measuring from the right edge of the page, the X value will be a negative number.

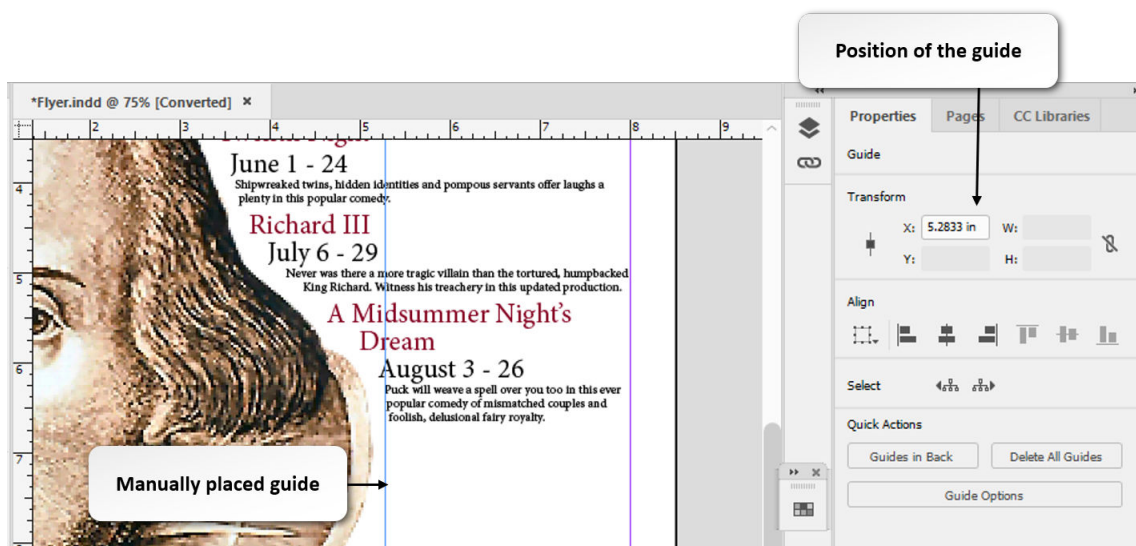


Figure 4-2: The Properties panel can be used to specify the exact guide position.

Grids

A **grid** is an on-screen alignment tool that can be used to align objects or columns of text. Grids come in two types. **Baseline grids** are used to align columns of text. **Document grids** are used to align objects. You can customize the color and spacing increments of both types of grids. Grids can't be moved or positioned on screen, nor do they print. You can hide or display grids, whenever needed.



Figure 4-3: An example of grids in a document window.

Gridify Objects

The Gridify feature in InDesign allows you to create a grid of evenly spaced objects on a page, making it possible to place multiple images into your document with ease. Gridify turns a lengthy process into a quick one by allowing you to place multiple images by simply dragging the place cursor while pressing the up arrow to add new rows and the right arrow to add new columns. When you have finished, InDesign will automatically create frames and place your images in them.

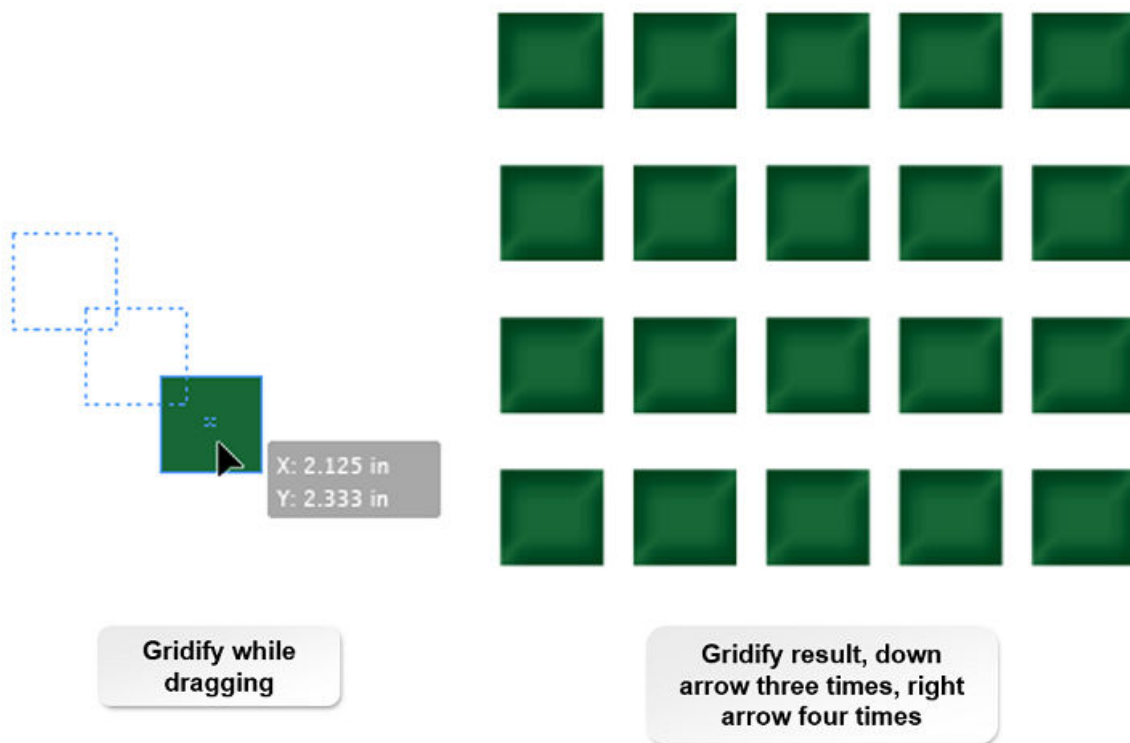


Figure 4-4: Gridifying objects.

The Align Panel

The **Align** panel can be used to evenly distribute space between objects and to align objects in relation to one another. You can distribute objects horizontally or vertically along selections, margins, pages, or spreads. Aligned text paragraphs that are locked will not be affected by the settings specified in the **Align** panel.

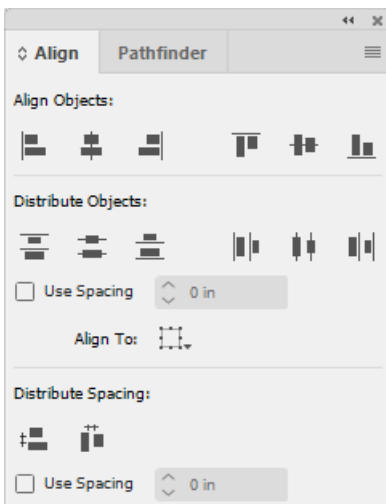


Figure 4-5: The Align panel.

The Adjust Layout Dialog Box

If you need to change the page size of a document after text and images have been added, InDesign offers a feature that automatically arranges the text, images, or other elements for you. The **Adjust**

Layout feature automatically adjusts all elements in the layout when the page size, page margin, or bleed of a document is changed. This dialog box can be opened from the **Properties** panel, but can also be accessed from the **File** menu.

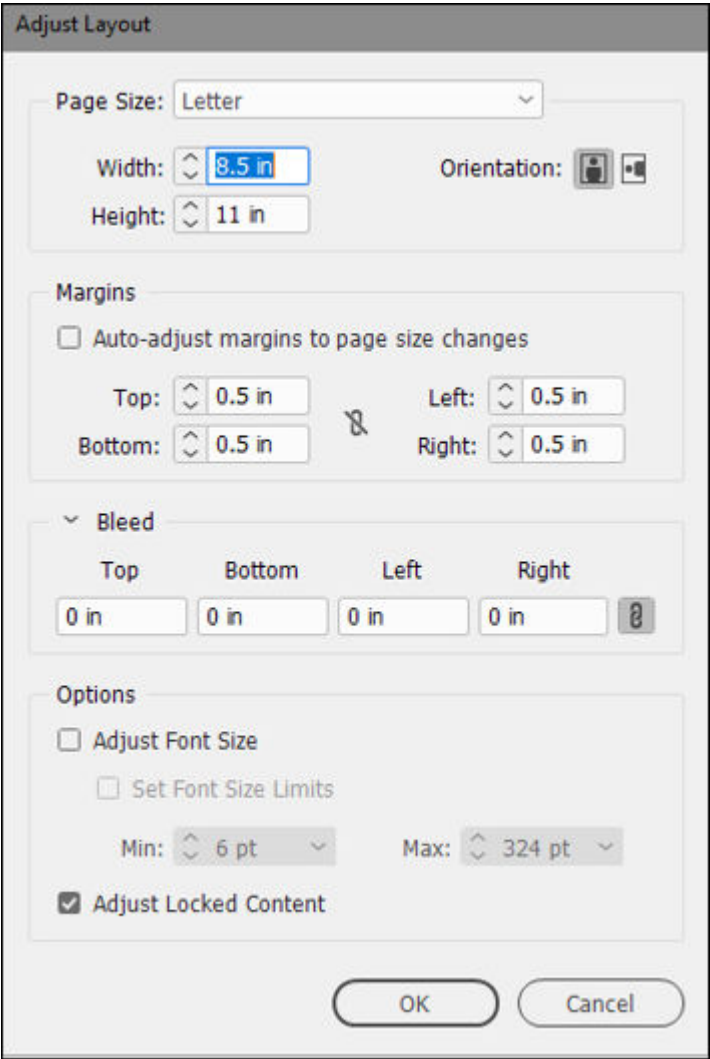


Figure 4–6: The Adjust Layout dialog box.

Option	Description
Page Size	Select a page size from the drop-down list or manually specify values for width and height. You can also select the orientation for your document.
Margins	Select Auto-adjust margins to page size changes to automatically adjust the margins with the changes you made in the page size, or manually specify the values for the margins.
Bleed	Specify the values for the bleed area of the document.
Adjust Font Size	Select this check box to automatically adjust the font size in your document based on the page size and margin changes. You can also select Set Font Size Limits to define a minimum and maximum font size.

<i>Option</i>	<i>Description</i>
Adjust Locked Content	Select this check box to adjust the locked content in your layout.

	Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Arrange and Align Objects.
---	--

ACTIVITY 4–1

Arranging and Aligning Objects

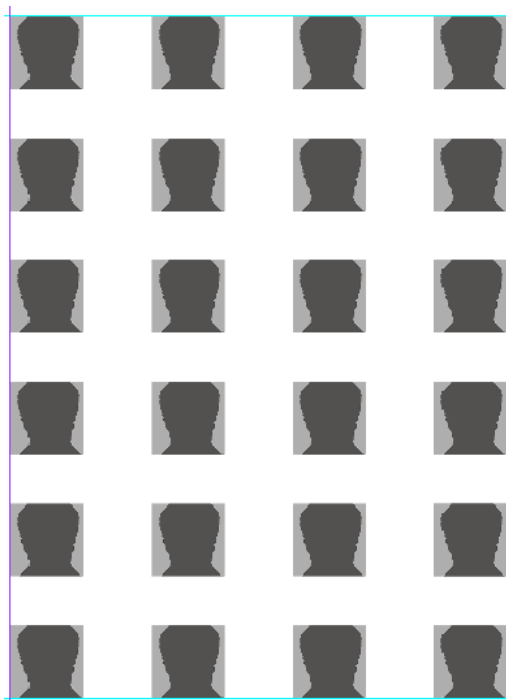
Data File

C:\092023Data\Working With Page Elements\Playbill Lesson 4.indd

Scenario

The playbill is coming right along. The producers informed you that they won't have the actors' head shots until just before the playbill will go to press. In order to keep to your deadline, you decide to lay out the cast photos page by using a placeholder graphic and replace them later. You've placed 24 placeholder graphics on the page, but they need to be better aligned. You also notice that the Scrimdown Playhouse logo on the cover needs some attention because it's partially obscured by the graphic of Shakespeare.

1. Adjust the arrangement of objects on the cover.
 - a) From the **C:\092023Data\Working With Page Elements** folder, open the **Playbill Lesson 4.indd** file. When prompted, update the links.
 - b) Navigate to page **1** if necessary.
 - c) On your keyboard, press **Ctrl+0** to fit the page in the window.
 - d) With the **Selection** tool, click the graphic frame containing the image of William Shakespeare.
 - e) On the **Menu** bar, select **Object→Arrange→Send to Back**.
 - f) Verify that the Scrimdown Playhouse logo is now on top of the William Shakespeare image.
2. Use the smart guides to align the multiple placeholder graphics so they are placed and spaced evenly on the page. Refer to the following image.



- a) Navigate to page 5.
- b) If necessary, on the **Menu** bar, select **View→Show Rulers**.



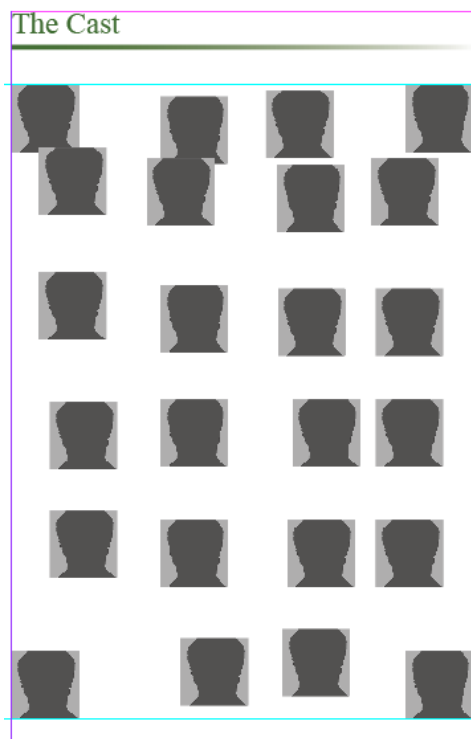
Note: If rulers are already showing, you will instead see the **Hide Rulers** option.

- c) Click in the horizontal ruler and drag a guide downward to just below the headline "The Cast."
Make sure you are dragging down into the page "The Cast" and not "Pre-Bard Dinner."
- d) In the **Control** panel, in the **Y** field, select the value and type **1** and then press **Enter**.
- e) Click and drag another guide down from the horizontal ruler to a location near the bottom of the page, below all the headshot images.
- f) In the **Control** panel, in the **Y** field, select the value and type **8** and then press **Enter**.
- g) Select **View→Grids & Guides** to verify that the **Snap to Guides** feature is enabled.
- h) Click the placeholder graphic at the top-left corner and drag it until it snaps to the intersection of the left margin guide and the top blue smart guide below the headline.









Note: Different smart guides will appear in different places, attempting to help you align the object to parts of other objects such as top, bottom, left, and right. The goal is to eventually evenly space all placeholder graphics across the page.

- i) Drag the top-right placeholder graphic until it snaps to the intersection of the right margin guide and the new guide below the headline.
- j) Drag the bottom-left placeholder graphic until it snaps to the intersection of the left margin and the bottom blue guide.
- k) Drag the bottom-right placeholder graphic until it snaps to the intersection of the right margin and the bottom blue guide.



3. Use the **Align** panel to align rows.

- a) Select **Window→Object & Layout→Align**.

- b) Select the first placeholder graphic in the upper-left corner, then hold down **Shift** and select the remaining three placeholder graphics in the top row.
 - c) In the **Align** panel, in the **Align Objects** section, select the **Align top edges** button. 
 - d) In the **Align** panel, in the **Distribute Objects** section, select the **Distribute horizontal centers** button. 
 - e) Select the first placeholder graphic in the bottom-left corner, then hold down **Shift** and select the remaining three placeholder graphics in that row.
 - f) In the **Align** panel, in the **Align Objects** section, select the **Align bottom edges** button. 
 - g) In the **Align** panel, in the **Distribute Objects** section, select the **Distribute horizontal centers** button.
4. Continue aligning the remaining placeholder graphics.
- a) Select all six placeholder graphics in the far left column.
 - b) In the **Align** panel, select the **Align left edges** button  and then the **Distribute vertical centers** button. 
 - c) Repeat this step to align and distribute the placeholder graphics in the second and third columns.
 - d) Select all six placeholder graphics in the far right column.
 - e) In the **Align** panel, select the **Align right edges** button  and then the **Distribute vertical centers** button.
 - f) Close the **Align** panel.
5. Save the file as *My Playbill Lesson 4.indd* and leave the file open for the next activity.
-

TOPIC B

Apply Layers

You've learned how the Arrange and Align features can greatly aid your work flow. Using layers is another way to make your work flow more efficient. Layers will help you ensure that objects on the page are not obscured by other objects and edits to one object will not inadvertently be applied to others. In this topic, you will use layers.

Layers

Layers are transparent elements of a document that are stacked. You can place graphics and text on layers. They can be used to display alternate design solutions for the same layout because you can hide one transparent sheet and view the other sheets. Individual layers can be edited, relocated, or deleted without affecting other layers.



Note: To learn more about transforming objects, check out the Spotlight on **Applying Transparency** presentation from the **Spotlight** tile on the CHOICE Course screen.

The Layers Panel

The **Layers** panel displays all layers used in a document. Layers are listed with the top layer appearing at the top of the panel. You can create, duplicate, delete, hide, lock, and merge layers, as well as specify options that determine how layers are displayed and printed. You can move objects from one layer to another, as well as change the stacking order. When a layer is created, it is positioned just above the current active layer and is assigned a default name. You can change the name of the layer to something meaningful. You may also assign colors to layers so you can easily distinguish them from other layers.

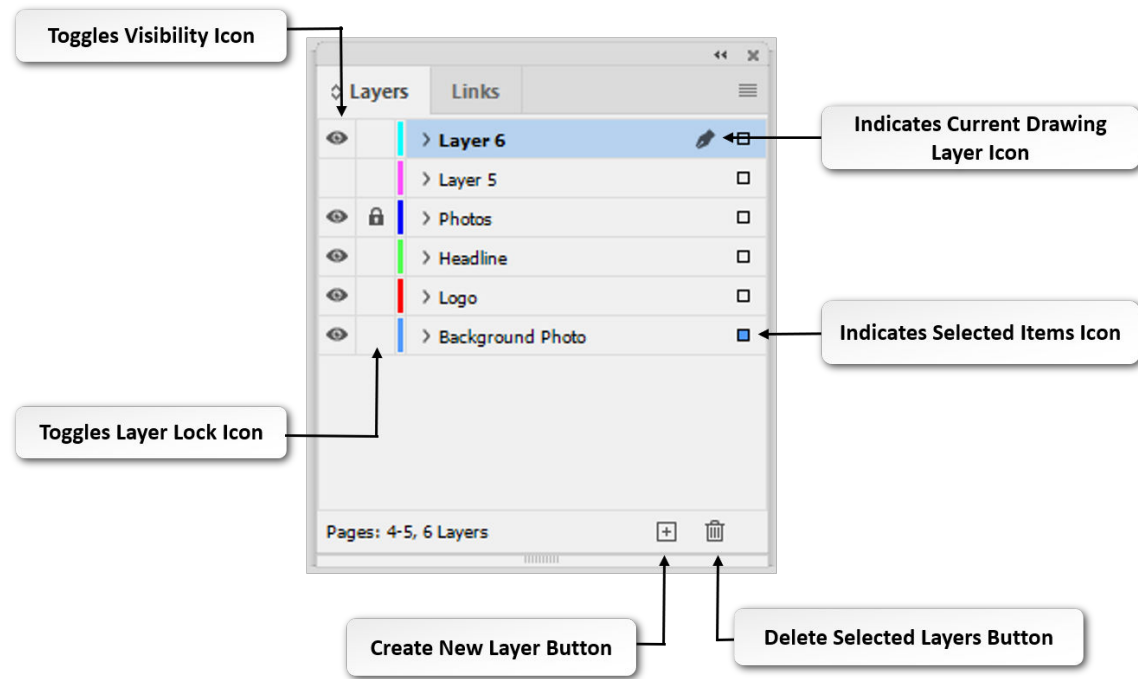


Figure 4–7: The Layers panel displaying the available layers in a document.

Flattening

Flattening is when you merge artwork in a document into a single, printable layer. During flattening, InDesign identifies areas where transparent objects overlap other objects and divides them into components.



Note: You can **Undo Flattening** immediately after you've applied it, but if you save or perform other operations, flattening can't be reverted.



Access the Checklist tile on your **CHOICE** Course screen for reference information and job aids on **How to Apply Layers**.

ACTIVITY 4–2

Applying Layers

Before You Begin

My Playbill Lesson 4.indd is open.

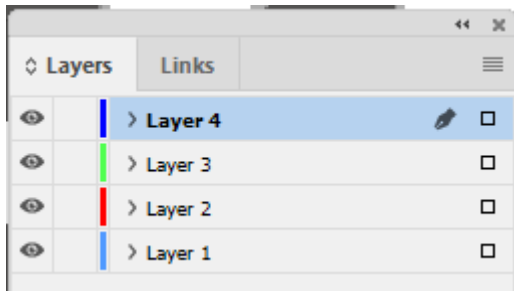
Scenario

The Scrimdown Cafe has asked you to include a full-page ad in the festival playbill. They provided the artwork and photos, and from these you have created a layout. After submitting the ad design for approval, they asked if the headline could overlap part of the food photos. You decide that it will make your work easier if you place the elements of the ad layout on separate layers. This way, if you need to make edits to some of the elements, it can be done without affecting other elements.

1. Navigate to page 4.
2. Select **Window→Layers**.
3. Add 4 new layers to the document.
 - a) In the **Layers** panel, at the bottom, click the **Create New Layer** button.

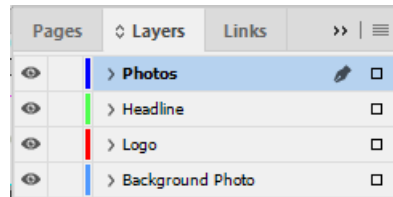


- b) Repeat this two more times until there are four layers in the document.



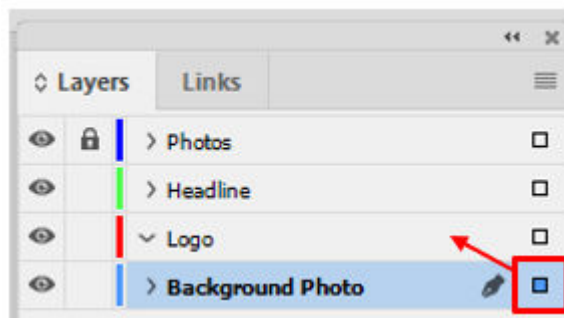
4. Rename the layers for the different page elements.
 - a) Double-click **Layer 1**.
 - b) In the **Layer Options** dialog box, in the **Name** box, type **Background Photo**
 - c) Select **OK**.
 - d) Double-click **Layer 2** and rename it **Logo**
 - e) Double-click **Layer 3** and rename it **Headline**

- f) Double-click **Layer 4** and rename it *Photos*

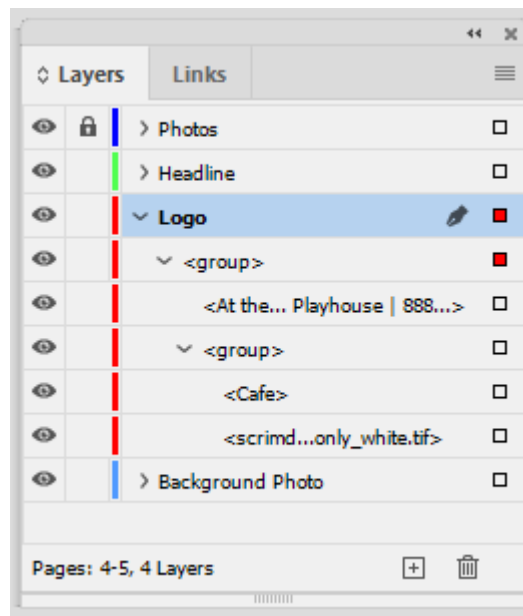


5. Redistribute graphics to the new layers. All of these actions involve selecting something in the document and dragging the Background Photo layer up onto another layer.

- Select the **Background Photo** layer.
- In the document, select the **Scrimdown Cafe** logo.
- In the **Layers** panel, on the **Background Photo** layer, select the **Indicates selected items** button and drag it up onto the **Logo** layer.



If you expand the **Logo** layer, your result should look similar to the following.



- Again select the **Background Photo** layer.
- Select the text frame containing the headline "Pre-Bard Dinner."
- On the **Background Photo** layer, select the **Indicates selected items** button and drag it up onto the **Headline** layer.

Observe that after you drag the **Background Photo** layer up onto the **Headline** layer, if you expand the **Headline** layer, you should see "Pre-Bard Dinner" appear under the **Headline** layer.

- g) Again select the **Background Photo** layer.
- h) Select the photo of the burger, hold down **Shift**, then select the photo of the latte.
- i) On the **Background Photo** layer, select the **Indicates selected items** button and drag it onto the **Photos** layer.

6. Move the headline to a new location.

- a) In the **Layers** panel, in the **Headline** layer, select the **Indicates selected items** button.
- b) In the **Control** panel, in the **Y** field, select the value and type **1.75** and press **Enter**.
- c) Verify that the headline is now behind the photo.



7. Change the stacking order of the layers.

- a) In the **Layers** panel, click the **Photos** layer and drag it below the **Headline** layer.
- b) Verify that the headline text is no longer obscured by the photos.



- c) Collapse the **Layers** panel.

8. Save the file and leave it open.

TOPIC C

Transform and Manipulate Objects

You've now been able to take advantage of the layers feature for organizing and editing in your document. As you continue to modify the elements of your document, you'll need to become familiar with the many tools for transforming and manipulating objects that are available in InDesign. In this topic, you will transform and manipulate objects.

The Transform Panel

The *Transform panel* displays information of a geometric nature such as position, size, rotation, and shear of an object. It offers you the ability to specify values for transforming these aspects of an object.

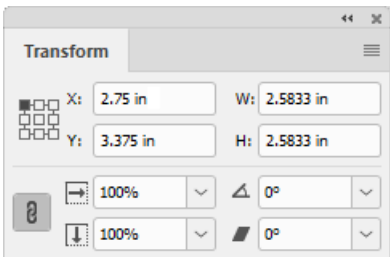


Figure 4–8: The Transform panel.

Component	Allows You To
Reference Point locator	Assign and reassign the reference point so that you can change the coordinates for the X and Y axes and the anchor point for rotation and skewing.
Constrain proportions for scaling button	Maintain the object's relative proportions when scaled.
X and Y fields	Specify the horizontal (X) and vertical (Y) positions of the selected object. These fields also allow you to change the position of the selected frame, and view the mouse pointer position when no object is selected.
W and H fields	Specify the width and height of an object when the object is selected.
Scale X Percentage drop-down list	Specify the value of an object to scale it horizontally in percentage.
Scale Y Percentage drop-down list	Specify the value of an object to scale it vertically in percentage.
Rotation Angle drop-down list	Specify the rotation angle of an object. A positive angle will rotate the object counterclockwise, while a negative angle will rotate it in a clockwise direction. You can change the axis of rotation by changing the object's reference point.
Shear X Angle drop-down list	Specify the shear or slant angle of an object, and rotate both objects' axes.

<i>Component</i>	<i>Allows You To</i>
Panel options menu	Access a range of additional transformation options such as scaling, rotating, and flipping. You can turn on additional conditions such as including stroke weight in the dimensions and adjusting stroke weight when scaling.

Transform Again Command

The **Transform Again** commands are used to apply the most recently applied transformation repeatedly on a single or multiple objects.

<i>Command</i>	<i>Description</i>
Transform Again	The previous transformation is applied to the selected objects as a group.
Transform Again Individually	The previous transformation is applied to the selected objects one after the other, and not as a group.
Transform Sequence Again	The previous set of sequentially applied transformations is applied to the selected objects as a group.
Transform Sequence Again Individually	The previous set of sequentially applied transformations is applied to the selected objects one after the other, and not as a group.

Snap Values

InDesign snaps to logical values when moving items on a page, based on the current unit of measurement. This helps you avoid specifying values with decimal values. For example, pixel values are rounded off to the nearest whole number, and inch values are rounded to the nearest eighth of an inch.

Resize Content

In the past, resizing content had been a tedious task. Fortunately, it has become easier. When it comes to text frames, you can access the **Text Frame Options** dialog box from the **Object** menu, and you can turn on and adjust auto-sizing. When auto-sizing is turned on, your text frame will automatically adjust its size when text is added or removed, something that once had to be done manually.

When it comes to resizing images, you can fit an object to a frame by selecting **Object**→**Fitting** and selecting a command. **Fill Frame Proportionally** allows the image to fill the frame, leaving parts of the image visible outside of the frame when the shapes of the image and frame are different. **Fit Content Proportionally** will ensure that the entire image is inside the frame. In addition, you can fine-tune the scaling of an image within a frame. If you select **Content-Aware Fit**, InDesign will automatically fit the best part of the image when you place it inside a frame, based on the dimensions and aspect ratio of the frame and by evaluating various parts of the image. InDesign also allows you to scale or resize multiple objects, including images and text frames, at the same time.



Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Transform and Manipulate Objects.

ACTIVITY 4–3

Transforming and Manipulating an Object

Data File




C:\092023Data\Working with Page Elements\images\Cocktail.tif

Before You Begin

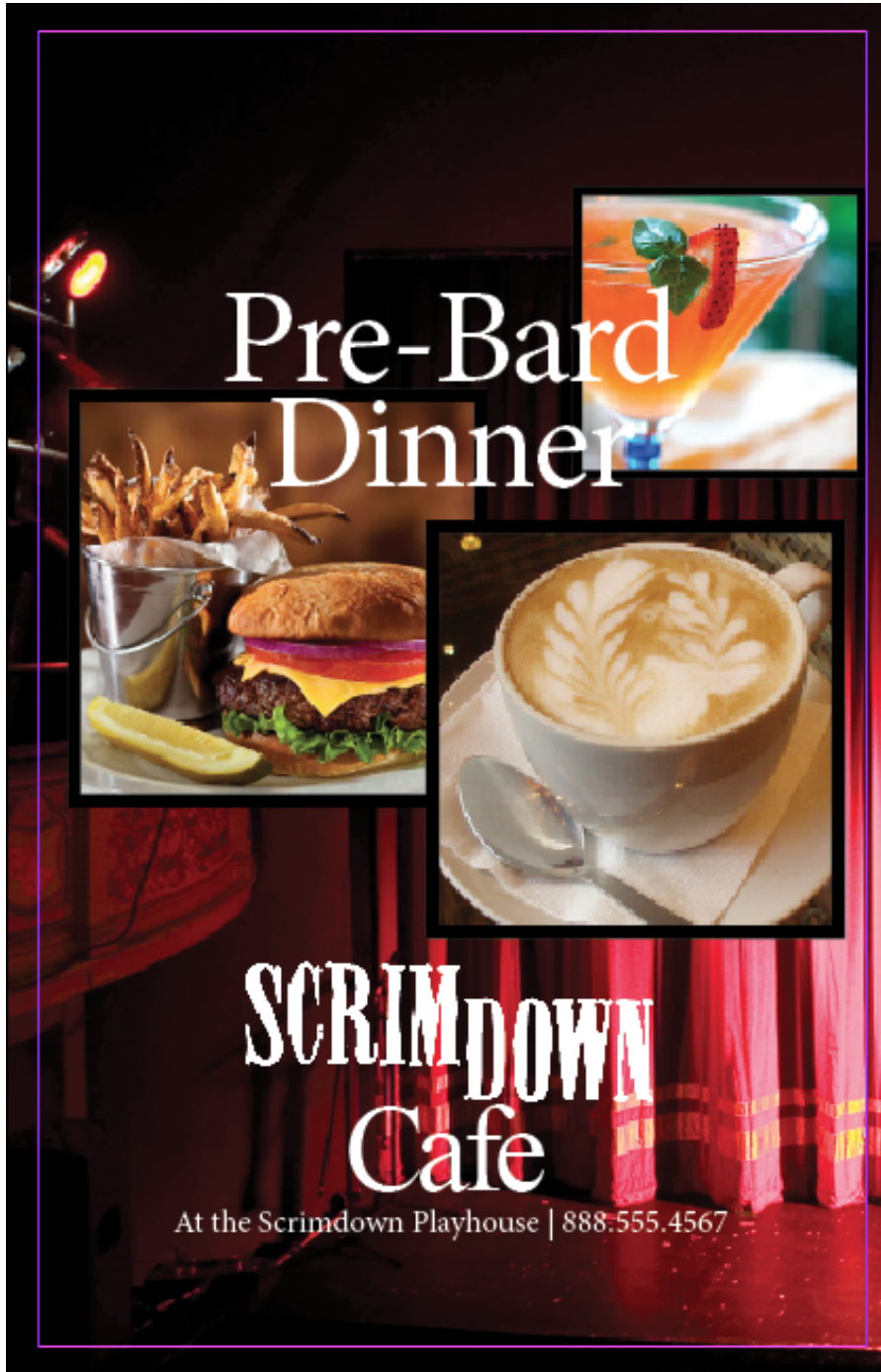
My Playbill Lesson 4.indd is open.

Scenario

The Scrimdown Cafe just got its liquor license. The owners want a photo of a cocktail included in their advertisement on page 4 of the festival playbill. You located a suitable photo that needs some modification for it to work in the layout. In addition, the advertising department has sold more ad space in the playbill and has asked you to create three ad boxes on page 6 to reserve the space.

1. Ensure you are on page 4.
2. Create a new graphic frame for the cocktail photo.
 - a) Select the graphic frame containing the latte photo.
 - b) Select **Edit→Duplicate**.
 - c) If necessary, select the duplicate photo of the latte.
3. Place the new photo of the cocktail.
 - a) Select **File→Place**.
 - b) Browse to the folder C:\092023Data\Working with Page Elements\images.
 - c) If necessary, uncheck **Show Import Options**.
 - d) Select **Cocktail.tif** and select **Open**.
4. Select **Window→Object & Layout→Transform**.
5. Make adjustments to the properties.
 - a) Verify that **Constrain proportions for scaling**  is enabled.
 - b) In the **Scale X Percentage** field  select the value, type **70** and press **Enter**.
 - c) Click the center box of the **Reference Point** .
 - d) From the **Transform** panel options menu, select **Flip Horizontal**.
 - e) In the **X** field, select the value and type **4.396** and press **Tab**.
 - f) In the **Y** field, select the value and type **2.0556** and press **Enter**.
 - g) Close the **Transform** panel.

h) Save the file.



- i) Navigate to page 6.
- j) In the **Tools** panel, select the **Rectangle** tool.
- k) Click and drag in the document window.
- l) In the **Control** panel, in the **W** field, select the value and type **2.3** and press **Tab**.
- m) In the **Control** panel, in the **H** field, select the value and type **1.5** and press **Enter**.

6. Edit the corners by using live corner effects.

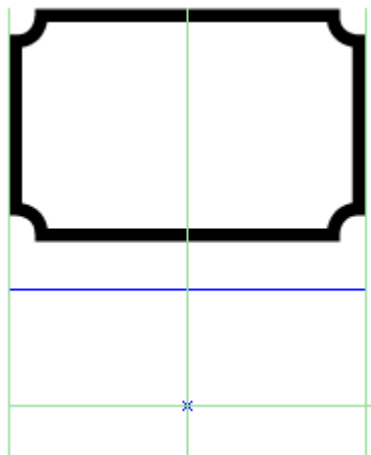
- a) With the **Selection** tool, **Alt-click** the yellow box on the right side of the rectangular frame.
This will place yellow diamonds on each corner of the box.

- b) **Alt-click** one of the yellow diamonds.
- c) Verify that the corner shape has changed.
- d) While holding the **Alt** key, click the yellow diamond several more times until all four corners are now inverted curves.



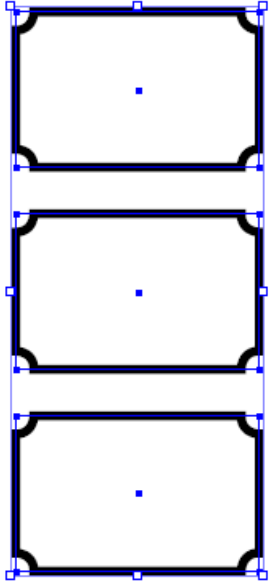
7. Copy and paste the ticket-shaped ad boxes into a column.

- a) With the rectangle frame selected, copy by dragging the frame downward while holding down the **Alt** key.
- b) Release the **Alt** key and press the **Right Arrow** key once as you continue dragging downward.



- c) Verify that a total of three boxes are now outlined and centered on a green guide.

d) Stop dragging when the spacing between the boxes is sufficient.



8. Save the file and leave it open.

TOPIC D

Thread Text Frames

Now that you know how to manipulate and transform objects, you can learn how to thread text. Often, you will need a large amount of text to flow across several text boxes and automatically adjust the amount of text if the text box sizes change. You can do that with text threading.

Story

A **story** is an uninterrupted body of text that flows in a text frame. A text frame is a subset of a story. A story can range from one letter to several pages of text. You can either place the text from a story in a single frame or spread the story across several linked frames. These frames don't need to be adjacent.

Text Overset

Text overset is a feature for placing overflow text in another text frame. It occurs when the amount of text you want to place in a text frame or cell is more than the size of the text frame or cell can fit. In the event of an overset, additional text in the text frame is indicated by a red plus sign (+) in the bottom-right corner of the text frame. You can allow for the overset text by resizing the text frame or cell, reducing the font size of the text, or by clicking the red plus sign (+). Clicking the plus sign with the **Selection** tool will load the mouse pointer with the missing text so that it can be placed in another text frame.

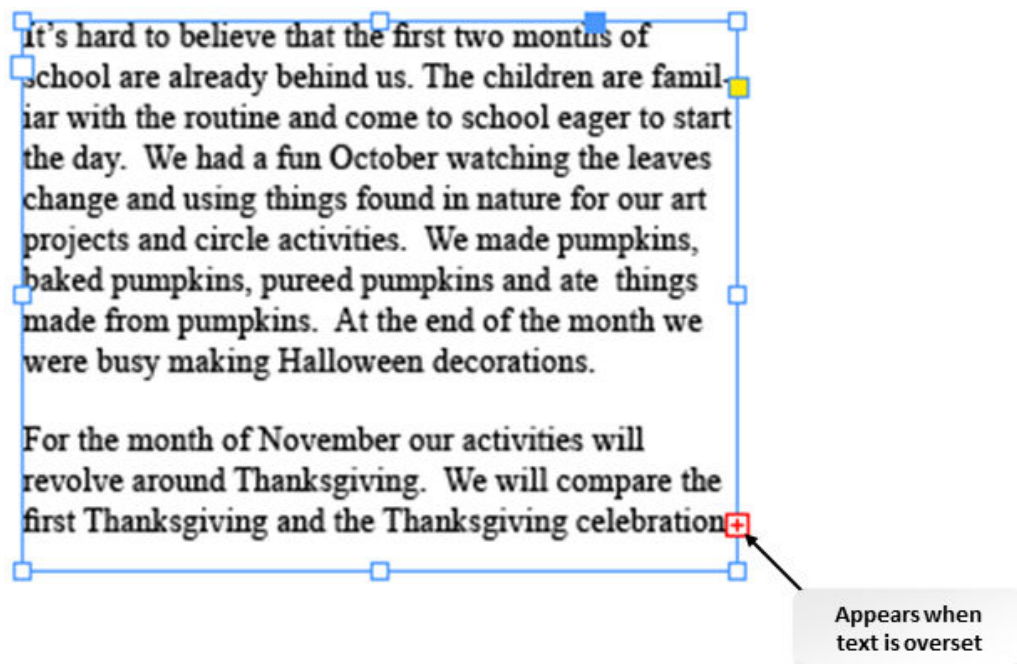


Figure 4–9: Text overset.

Text Threading

Text threading is designating one text frame to receive text that is overset in another text frame. Each text frame contains an in port and an out port that can be used to make connections with other text frames.

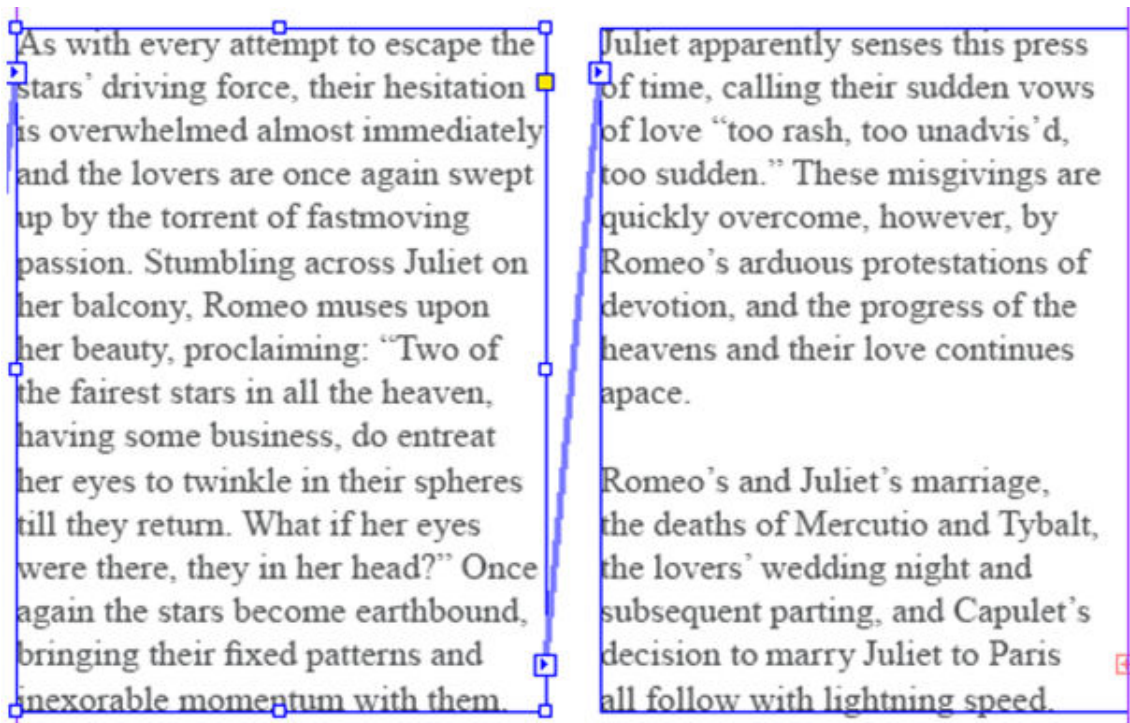


Figure 4-10: Threaded text frames showing an overset out port.

Text Thread Navigation

A series of threaded text frames that contain a story will display arrows that connect the bottom of one text frame to the top of the next threaded frame in the story. This visual cue can be very helpful when a document contains several stories flowing through multiple threaded text frames.

Text Flow by Using Text Threading

When you place text in a frame that is threaded, text automatically flows to the threaded frames, regardless of the method used for text flow.

Smart Text Reflow

The Smart Text Reflow feature allows for automatic addition and removal of pages when text is added or edited in a document. When you type or paste more text than can be accommodated in a text frame on a page, a new page is inserted with a text frame in which the overset text is displayed. Similarly, when you delete text in a frame, the text flow is automatically adjusted and any empty text frames or pages at the end of the text thread are removed.

Semiautomatic Text Flow

When text flows from one frame to another, it stops at the new frame. An overset symbol will appear in the new frame if the entire text doesn't fit in the frame. To continue flowing the text, select the overset symbol. If you hold down **Alt** when you click in a frame, the mouse pointer automatically appears again as a loaded text icon.

Automatic Text Flow

Holding down **Shift** as you click in a text frame with a loaded text icon will cause the text to automatically flow into as many additional frames as is necessary to display all the text.

Threaded Frame Removal

InDesign allows you to delete a frame from the middle of a threaded story. Deleting a frame does not delete the text it contains. Instead, the text of the deleted text frame flows into the next frame in the thread.

Frame Unthreading

To unthread frames, apply the same process that is used to manually thread the frames. This will let you break stories apart whenever the need arises.



Access the Checklist tile on your **CHOICE** Course screen for reference information and job aids on **How to Thread Text Frames**.

ACTIVITY 4-4

Threading Text Frames

Data File

C:\092023Data\Working with Page Elements\dramaturgicalNotes.doc

Before You Begin

My Playbill Lesson 4.indd is open.

Scenario

You've just received the text from the Playhouse director for placement in the playbill. It's a bit longer than you had planned on, but you decide that you can run the article on several pages and break it up with some of the ads.

1. Select **View→Fit Spread in Window**.

2. Move the three ad boxes to a new location.



- Verify that the **Selection** tool is enabled.
- If necessary, hold down **Shift** and select all three rectangular frames.



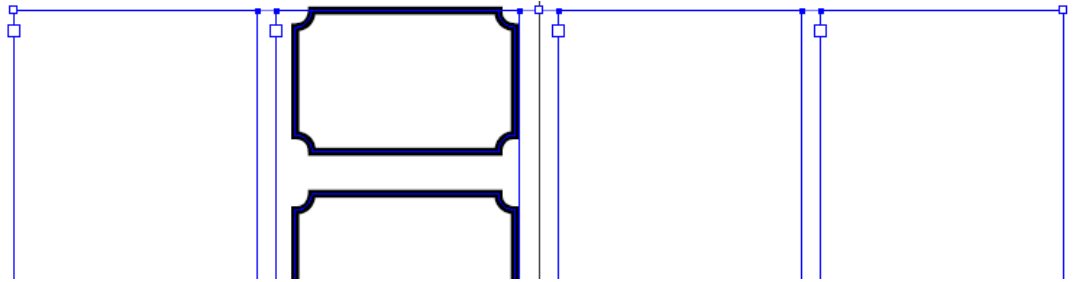
Note: An alternative to using **Shift** is to draw a marquee with the **Selection** tool that encompasses the objects you need to select.

- In the **Control** panel, in the **X** field, change the value to **4.15** and press **Tab**.
- In the **Control** panel, in the **Y** field, change the value to **2.755** and press **Enter**.

3. Create a new text frame.

- In the **Tools** panel, select the **Type** tool.
- Place the **Type** tool mouse pointer near the top-left margin on the left page (page 6) and drag downward to the bottom-right margin.
- With the **Selection** tool, in the **Control** panel, if necessary, select the **Constrain proportions** button  so it is disabled.
- In the **Control** panel, select the upper-left box of the **Reference Point**. 
- In the **Control** panel, in the **W** field, change the value to **2.425** and press **Enter**.
- Create a column by holding down the **Alt** key and dragging a copy of the new field until its right edge aligns with the right page margin.

- g) Create a copy of the columns onto page 7 by selecting both fields on page 6. With both selected, hold down the **Alt** key and drag copies of the two fields onto the right page (page 7).



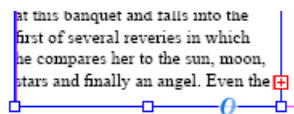
Note: You might want to press **Ctrl+H** to unhide text frames.

4. Place text in a text frame.

- With the **Text** tool, click inside the field at the far left.
- Select **Window→Styles→Paragraph Styles**.
- In the **Paragraph Styles** panel, select **[Basic Paragraph]**.
- Select **File→Place**.
- Browse to the folder **C:\092023Data\Working with Page Elements**.
- Double-click the **dramaturgicalNotes.doc** file.



5. Thread the text into the other three text frames.

- In the **Tools** panel, select the **Selection** tool.
- Select the out port box with the red plus sign at the bottom-right corner of the text frame.

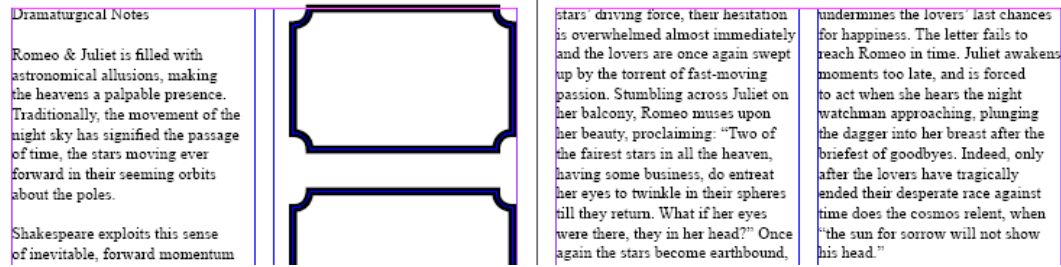


- Click in the right text column of page 6.
- Select the out port box in the right text column of page 6, then click in the left text column on page 7.
- Continue by threading the text onto the right text column of page 7.

6. Wrap the text around the rectangular frames.

- On the left page, select the right text frame. Select **Object→Arrange→Send to Back**.
- Select all three rectangular ticket frames.
- Select **Window→Text Wrap**.
- In the **Text Wrap** panel, select the **Jump object** button. 
- In the **Text Wrap** panel, confirm that the **Make all settings the same** button  is enabled. In the box to the right of the **Top Offset** button, change the value to **0.125** and press **Enter**.

f) Close the **Text Wrap** panel.



7. Save the document and leave it open for the next activity.

TOPIC E

Edit Text

The ability to quickly and efficiently edit text is invaluable when creating a document. You'll find that InDesign has taken this into account by providing the tools that do just that. In this topic, you will edit text.

Find/Change Dialog Box

The **Find/Change** dialog box allows you to specify text, special characters, or objects that you want to find and change in a document. The various tabs help you narrow your search.

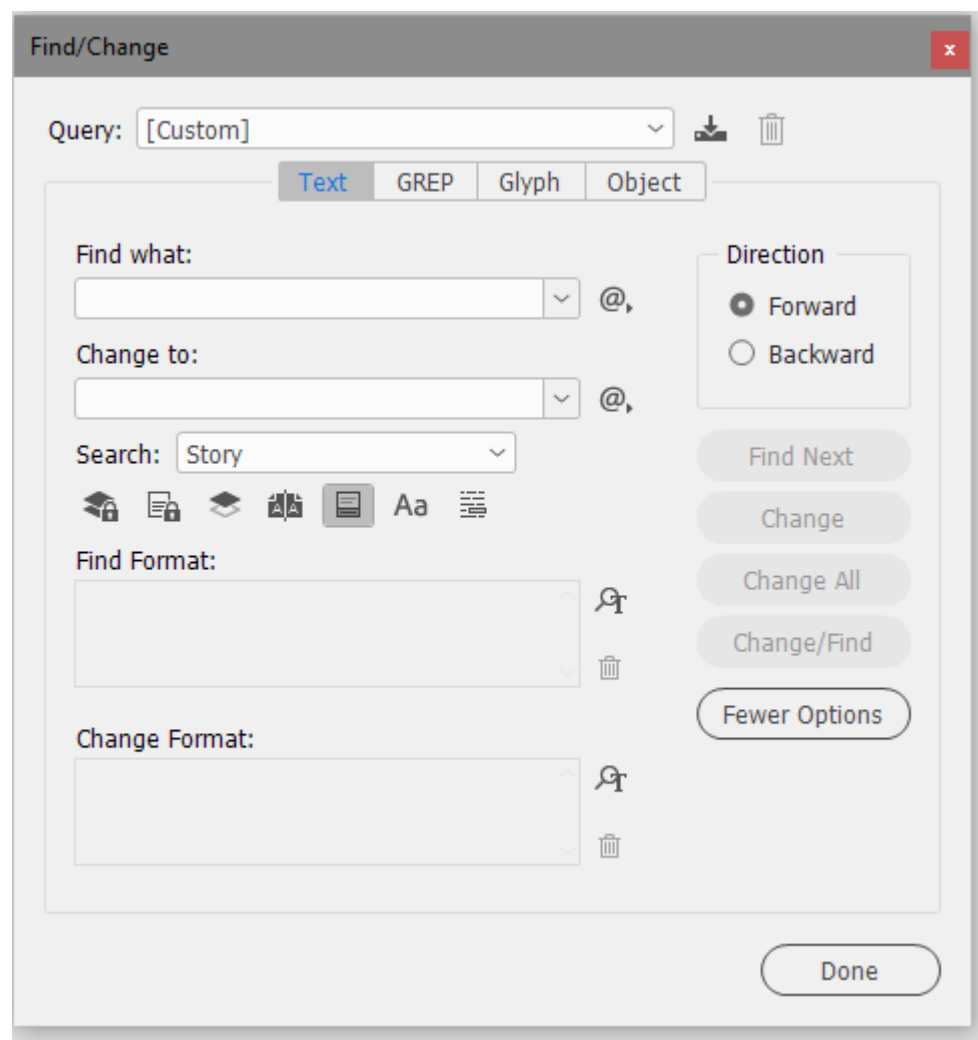


Figure 4–11: Find/Change dialog box for text updates.

Tab	Enables You To
Text	Search and replace specific occurrences of characters, words, groups of words, or formatted text. Additional buttons such as Case Sensitive and Whole Word enable you to efficiently search and replace the textual part of the content. The More Options button enables you to specify additional options for formatting text.
GREP	Search and replace alphanumeric strings in lengthy documents. The tab is used for advanced pattern-based searches. Searching for text within quotation marks and phone numbers are examples of Global Regular Expression Parser (GREP) searches.
Glyph	Search and replace glyphs by specifying the font or Unicode value of the glyph.
Object	Search and replace formatting effects and attributes in objects and frames.

The Find Font Command

Use the **Find Font** command (**Type**→**Find Font**) to search for and list the fonts used throughout your document. You can then replace any fonts (except those in imported graphics) with any other fonts available on your system. You can even replace a font that's part of a text style.

Story Editor

The **Story Editor** is a text-editing tool that allows you to focus on editing text without having to view the text in a formatted layout. Each story appears in a different **Story Editor** window. A vertical depth ruler indicates the extent to which text fills the frame, and a horizontal line indicates where text exceeds the frame size. When a story is edited, the changes are reflected in the layout window.

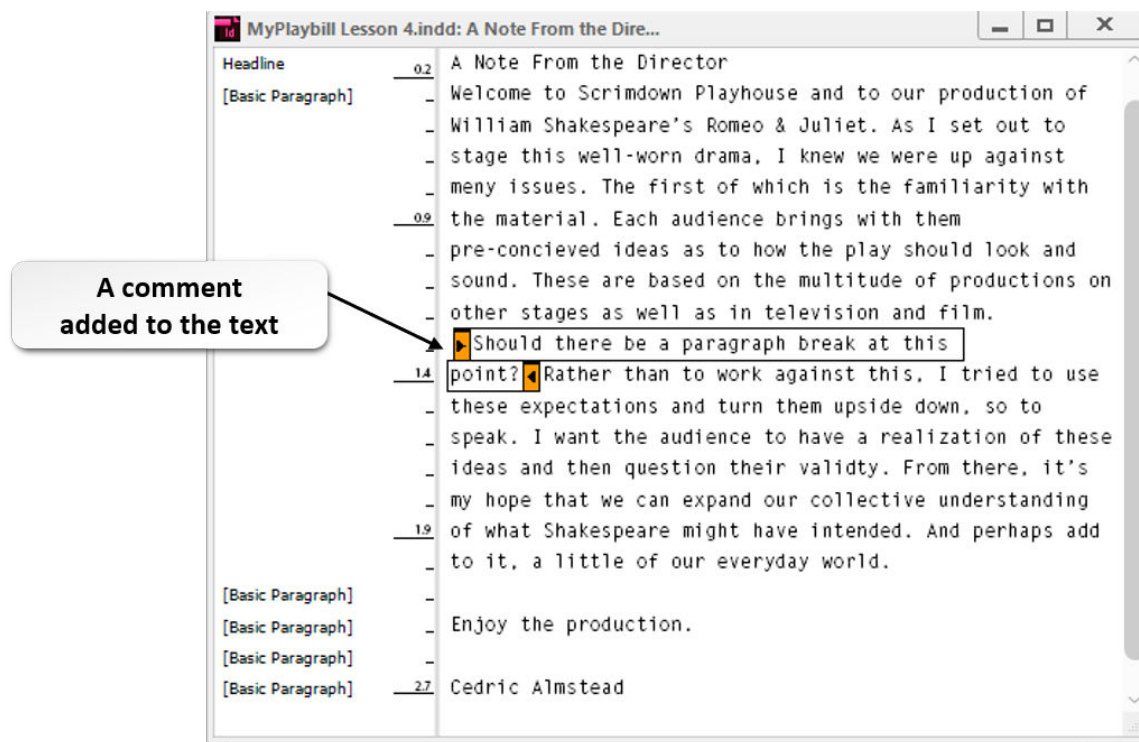


Figure 4–12: The Story Editor.



Note: When a **Story Editor** window is opened and closed, InDesign will remember. The next time you open **Story Editor**, it will be in its previous dimensions and location on the screen.

Autocorrect

Autocorrect automatically corrects misspelled words and capitalization errors. In the **Autocorrect** section of the **Preferences** dialog box, you can enable or disable **Autocorrect** and set any number of misspelled words and their equivalent corrections. You can add, edit, and remove misspelled words.

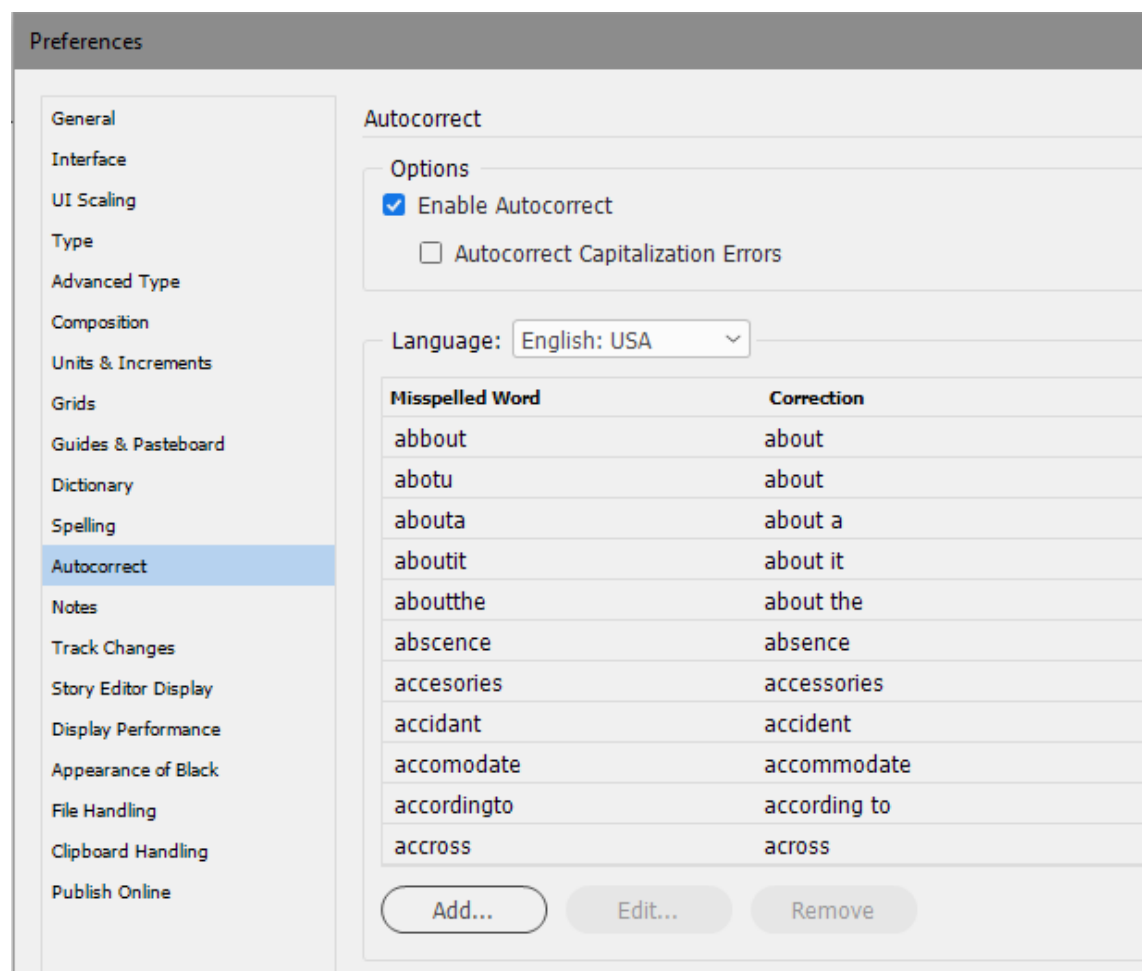


Figure 4-13: The Autocorrect dialog box.

Track Changes

When working with others on the same document, a valuable tool is **Track Changes**. **Track Changes**, which is accessible via the **Track Changes** panel, will allow anyone working on a document to track all their changes when they add, delete, or move text. The changes are marked and visible in the **Story Editor** in InDesign. When you view the changes that have been tracked, you can accept or reject them as necessary.

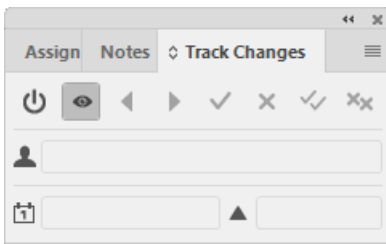


Figure 4-14: The Track Changes panel.

Spell Check

Spell check is a feature that lets you check for spelling errors in documents. You can manually check spelling or use dynamic spell check. By default, InDesign's spell check feature identifies all misspelled words, repeated words, uncapitalized words, or uncapitalized sentences in a document. Both manual and dynamic spell checking are configured in the **Preferences** dialog box on the **Spelling** tab.

Dynamic Spell Check

In the **Preferences** dialog box, in the **Dynamic Spelling** section, under the **Spelling** category, you can enable or disable the dynamic spell check feature. This feature detects misspelled words and underlines them when you type. The **Underline Color** section allows you to assign a specific color for different types of errors so that you can categorize them for fast editing and analyze the types of mistakes.

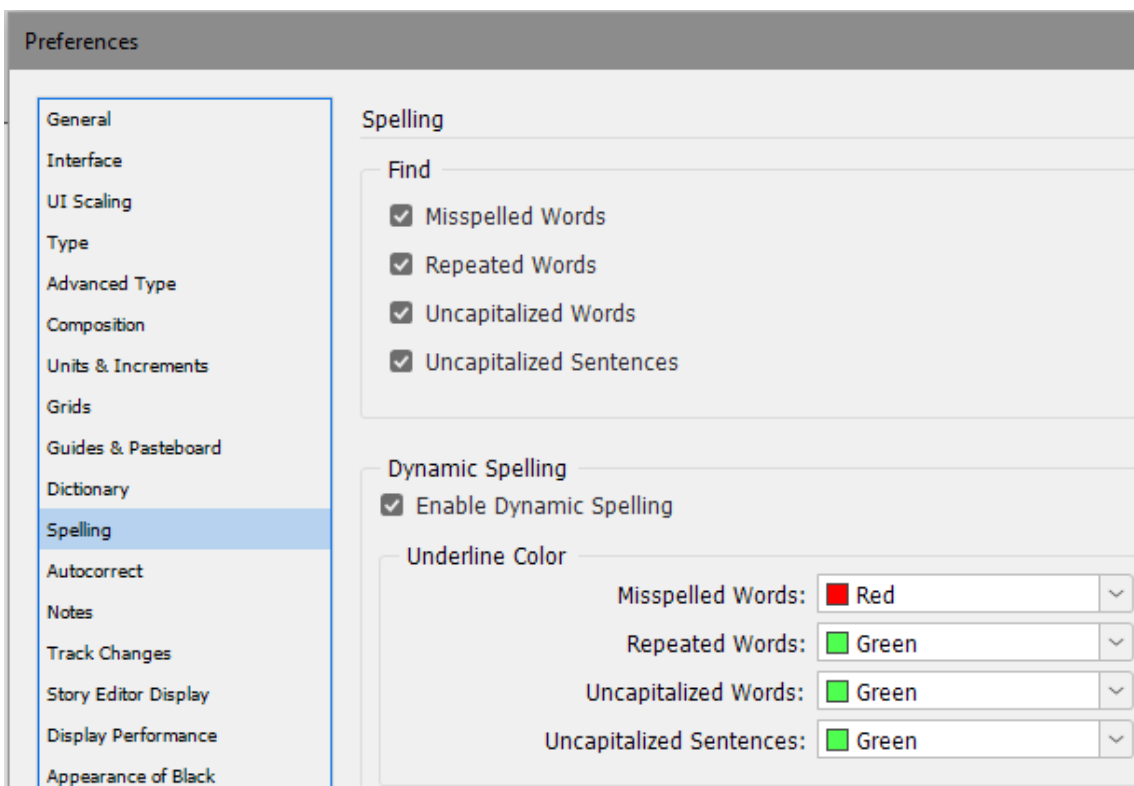


Figure 4-15: Configure Dynamic Spelling in the Preferences dialog box.

Manual Spell Check

When performing a manual spell check, you can change to the suggested correction, add the word that was not in the dictionary to the specified dictionary, skip the word, or ignore all instances of that spelling. You can specify what to search including a selection, a story, the document, to the end

of the story, or just this document. You can also specify whether the spell check is case sensitive. In addition, you can specify whether to move backward or forward through the search area.

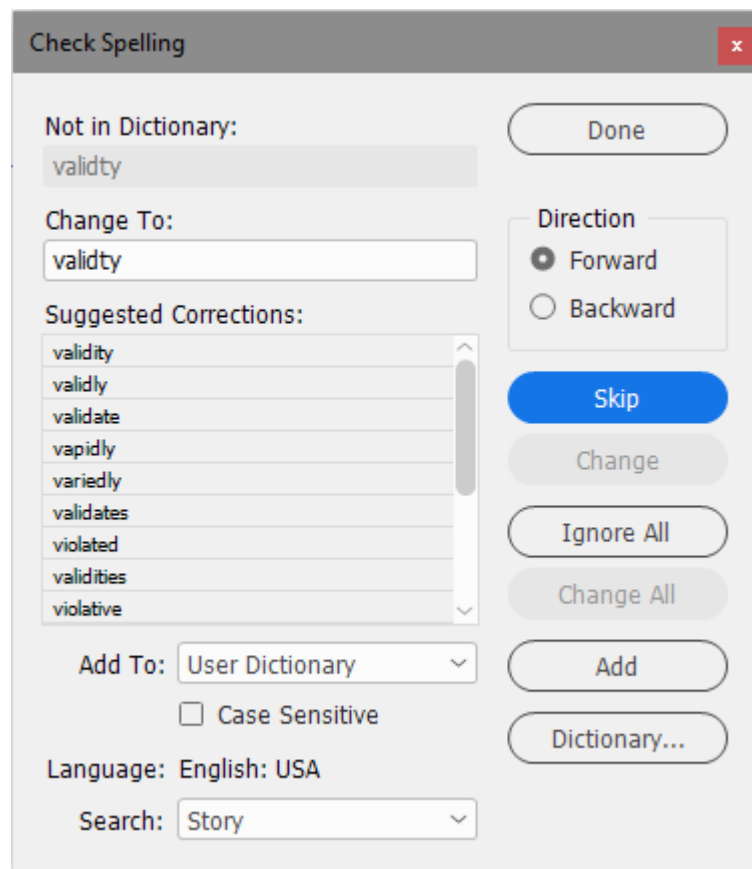


Figure 4–16: The Check Spelling dialog box.

User Dictionaries

A **user dictionary** is a user-defined list of correctly spelled words that you can use to spell check documents. Word lists can be imported into user dictionaries by using the **Dictionary** dialog box. In the dialog box, there are buttons that let you create, add, remove, and export a user dictionary based on the emerging needs of editing. In the **Preferences** dialog box, in the **Dictionary** category, you can select the options for adding exceptions to the user dictionary, and recompose all the stories when defined settings are changed. You can create a user dictionary or add an existing user dictionary.

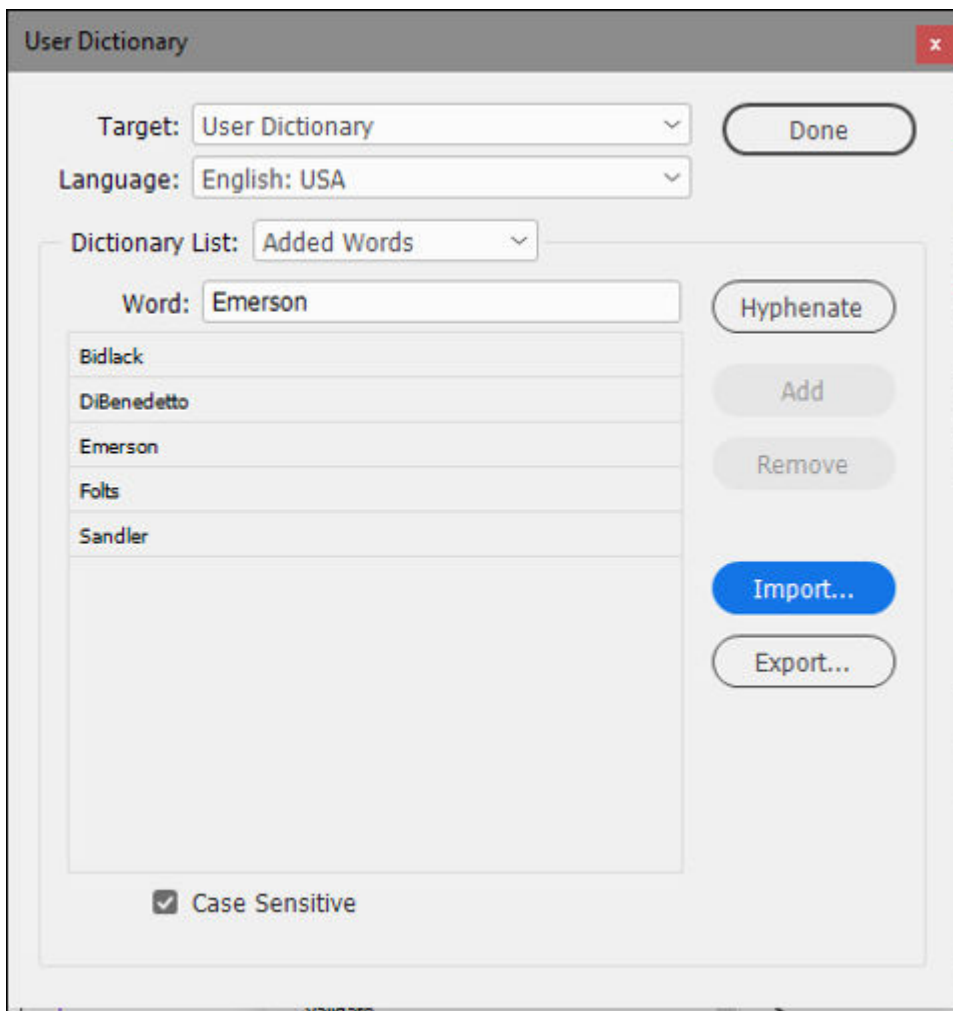


Figure 4-17: The User Dictionary dialog box.

Notes

Notes are brief entries or reminders that help you communicate information to a team member working on the same InDesign document, or to an editor reviewing the document. They are non-printing, and are meant for internal team communications. They are not something the end viewer would see. The **Notes** panel allows you to show or hide notes, cycle through the notes created, and add and delete notes from an InDesign document. Notes are indicated with a note anchor (📌) in the **Layout** view. Selecting the note anchor displays the text of the note in the **Notes** panel. The content of the note is displayed between the note bookends in the **Story Editor** view. The user settings, such as the user name and color, can be set for the notes inserted in a document.

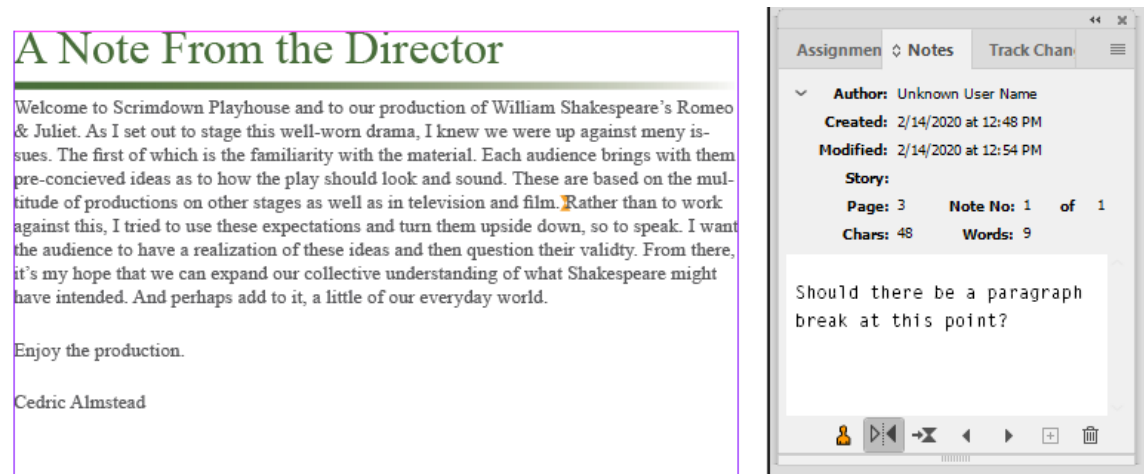



Figure 4-18: The Notes panel.

Story Editor Notes

Right-click the text to display a menu containing editing commands. One of the useful commands on this menu is **New Note** which can be used to place a comment in the text.

The bottom section of the **Story Editor** menu contains additional commands for working with notes. From here, you can navigate between notes, remove existing notes, convert the note to text, and more.

	<p>Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Edit Text.</p>
--	---

ACTIVITY 4–5

Editing Text

Before You Begin

My Playbill Lesson 4.indd is open

Scenario

Cedric Almstead, the director of *Romeo & Juliet*, has informed you that you've run out of time to proofread the Director's Notes text that he gave you the other day. You decide to run a spell check on that text to determine if edits are needed.

1. Open the **Story Editor** to work on the text.

- Navigate to page 3.
- On the **Menu** bar, select **View→Fit Page In Window**.
- In the document window, click the text frame. Make sure you're selecting the "A Note from the Director" object.
- Select **Edit→Edit In Story Editor**.

2. Perform a spell check in the story editor.

- On the **Menu** bar, select **Edit→Spelling→Check Spelling**.
- In the **Check Spelling** dialog box, in the **Change To** field, verify that "Scrimdown" is displayed.
- Select **Skip**.
- In the **Change To** field, verify that the incorrect spelling "meny" is displayed.
- In the **Suggested Corrections** list box, select the suggestion **many** and select **Change** to replace the word with the correctly spelled word.
- In the **Change To** field, verify that the incorrect spelling "concieved" is displayed.
- In the **Suggested Corrections** list box, select the suggestion **conceived** and select **Change**.
- In the **Change To** field, verify that the incorrect spelling "validty" is displayed.
- In the **Suggested Corrections** list box, select the suggestion **validity** and select **Change**.
- In the **Change To** field, verify that the name "Almstead" is displayed.
- Select **Ignore All**.
- Select **Done** to close the **Check Spelling** dialog box.

3. Check spelling on this text frame again, adding Scrimdown to the User Dictionary.

- On the **Menu** bar, select **Edit→Spelling→Check Spelling**.
- When **Scrimdown** is located, select **Add**.
- Select **Done**.

4. Add a note in the **Story Editor** for your own reference.

- In the **Story Editor**, in the middle of the paragraph, click in front of the word "Rather."
- Select **Type→Notes→New Note**.
- In the **Note** box, type *Should there be a paragraph break here?*
- Close the **Story Editor** window.
- Verify that a yellow-orange symbol is now in front of the word "Rather."
- With the **Selection** tool, select the text frame, and then hover the mouse pointer over the yellow symbol to verify that the note is displayed in a tooltip box.

5. Save and close the file.

Summary

In this lesson, you worked with page elements in a number of ways. You arranged and aligned objects on the page. You distributed elements to different layers to make editing easier. Transformation and manipulation tools helped you to adjust the objects to fit your layout needs. You were able to flow text into your document by using the threading text feature. Finally, you learned how to proof your document with InDesign's editing tools.

What are some ways that you might use the transformation and manipulation tools in a layout?

How will using layers in a layout be helpful?



Note: Check your CHOICE Course screen for opportunities to interact with your classmates, peers, and the larger CHOICE online community about the topics covered in this course or other topics you are interested in. From the Course screen you can also access available resources for a more continuous learning experience.

5

Building Tables

Lesson Time: 45 minutes

Lesson Introduction

When working with documents that contain large amounts of text, consider using tables to organize and properly display the information. Adobe® InDesign® (2020) provides a robust table feature that enables you to configure and customize just about any type of table. In this lesson, you will build a table.

Lesson Objectives

In this lesson, you will:

- Create a new table.
- Format a table.

TOPIC A

Create and Modify a New Table

Sometimes the best way to present information is through the use of a table. By organizing information into rows and columns, you can show data in a more visually efficient manner than if you were to present it as running text. In this topic, you will create a new table.

Tables

A **table** is a container that enables you to organize text or graphics. Tables consist of boxes called cells. A group of cells arranged vertically is called a column, while a group of cells arranged horizontally is called a row. Header and footer table rows are useful for a table that splits across multiple threaded text frames because those rows appear in each threaded text frame, identifying table content.

May						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
		1	2	3	4 8 pm	5 8 pm
6	7	8	9	10	11 8 pm	12 8 pm
13	14	15	16	17	18 8 pm	19 8 pm
20	21	22	23	24	25 8 pm	26 8 pm
27	28	29	30	31		

Figure 5-1: An example of a table.

Table Creation Options

You can select a command from the **Table** menu to create a table. The **Create Table** command allows you to create a table from scratch. The **Convert Text to Table** command is used to convert text in a document to a table. The **Convert Table to Text** command is used to convert a table in a document to text. You can import tables from another application into InDesign documents by using the **Place** command.

The Table Options Dialog Box

The **Table Options** dialog box lets you apply basic formatting to a table. It can also be used to add strokes, fills, headers, and footers to a table.

Table Options

Table Setup | Row Strokes | Column Strokes | Fills | Headers and Footers

Table Dimensions

Body Rows: 5 Columns: 7

Header Rows: 2 Footer Rows: 0

Table Border

Weight: 1 pt Type: [Solid Black Line]

Color: [Black] Tint: 100% ☐ Overprint

Gap Color: [Paper] Gap Tint: 100% ☐ Overprint

☐ Preserve Local Formatting

Table Spacing

Space Before: 0.0556 in Space After: -0.0556 in

Stroke Drawing Order

Draw: Best Joins

☐ Preview OK Cancel

Figure 5–2: Table Options dialog box.

Tab	Used To
Table Setup	Add rows and columns in a table, apply borders to a table, add spaces before or after a table, and change the order or display of rows and column strokes.
Row Strokes	Define the rows to which strokes need to be applied, and set the weight, type, color, and tint for the row strokes inserted.
Column Strokes	Specify the columns to which strokes need to be applied, and set the weight, type, color, and tint for the column strokes inserted.
Fills	Define the rows and columns to which fills need to be applied, and set the color and tint for the fills inserted.
Headers and Footers	Add header and footer rows to a table, and specify how they appear in tables. Headers and footers will repeat if the table flows onto another page.

Copy and Paste Information into a Table

You can copy and paste tabbed text into a table or selection of cells in a table. Copying and pasting content into a table allows you to update the content while retaining the formatting applied to the

text in the table. Copy the tabbed text, then highlight the row of cells in the table and paste. The tabs ensure that the text is spread across the cells and not inserted into a single cell. If you have multiple rows of tabbed text, each row will go neatly into its own row in the table. This technique does not work, however, with commas. If you have comma separated text, and try to paste it across a row, all of the text will go into the first cell.

Table Structure Modification Options

You'll need to modify the structure of a table to include more information or to delete unnecessary information from the cells. You can delete and insert rows or columns, and merge or split cells. You can perform all these tasks by using the **Table** menu, the **Table** panel, or the **Table** panel options menu. In addition, you can use the **Table** panel to modify the row height and column width, align and rotate text inside cells, and set the cell inset spacing.

The Table Panel

The **Table** panel has many elements that can be used to modify the structure of an existing table and the text inside it.

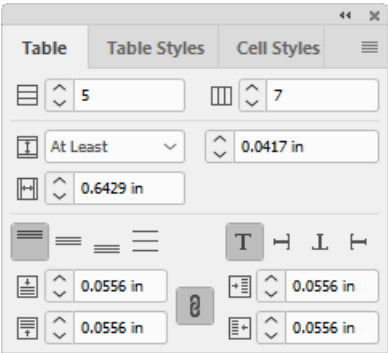


Figure 5–3: The Table panel.

Component	Description
Number of Rows	Allows you to specify the number of rows for a table.
Number of Columns	Allows you to specify the number of columns for a table.
Row Height	Allows you to modify the height of rows in a table.
Column Width	Allows you to modify the width of columns in a table.
Alignment	A section that lets you align text in a cell or table by using the Align top , Align center , Align bottom , and Justify vertically buttons.
Text rotation	A section that lets you rotate text within cells by using the Rotate text 0° , Rotate text 90° , Rotate text 180° , and Rotate text 270° options.
Cell inset	A section that lets you specify the top, bottom, left, and right spacing in cells. You can use the Make all settings the same button to set the same settings for all cells.

Table Panel Options

There are several commands available on the **Table** panel options menu that allow you to perform different functions when you work with tables.

Command	Allows You To
Table Options	Open the Table Options dialog box to modify table dimensions, row and column strokes, fills, and headers and footers.
Cell Options	Open the Cell Options dialog box to modify cell dimensions, color, tint, strokes, fills, and type.
Insert	Insert rows and columns by using the options in the Insert Row(s) and Insert Column(s) dialog boxes.
Delete	Delete rows, columns, and tables.
Merge Cells	Merge the selected cells in a table.
Unmerge Cells	Remove the merge feature from the selected cell so that it becomes separate cells.
Split Cell Horizontally	Split the selected cell in a table horizontally.
Split Cell Vertically	Split the selected cell in a table vertically.
Convert Rows	Change the selected cell or row to a header, footer, or body row in a table.
Distribute Rows Evenly	Distribute the selected rows evenly in a table.
Distribute Columns Evenly	Distribute the selected columns evenly in a table.
Edit Header	Edit a header row in a table.
Edit Footer	Edit a footer row in a table.



Access the Checklist tile on your **CHOICE** Course screen for reference information and job aids on **How to Create and Modify a New Table**.

ACTIVITY 5–1

Creating and Modifying a New Table

Data File


C:\092023Data\Building Tables\Postcard.indd

Scenario

The Scrimdown Playhouse marketing department needs a postcard created for distribution to their mailing list. In addition to the existing artwork from the flyer and the playbill, the postcard will also need a small calendar to indicate the performance schedule. After adding the calendar to the second side of the postcard, you see that you have added too many rows and will need to delete one. You also decide that it would be valuable to have the curtain time added to the performance dates. You will need to modify the table to add this additional information.

1. Browse to the folder C:\092023Data\Building Tables and open the file Postcard.indd. When prompted, update modified links.
2. Draw a text frame on the second page of the postcard.
 - a) Ensure you are on page 2.
 - b) Select **View→Fit Page In Window**.
 - c) Select the **Rectangle** tool.
 - d) In the **Tools** panel, towards the bottom of the tools, verify that **Fill** and **Stroke** are set to **None**.

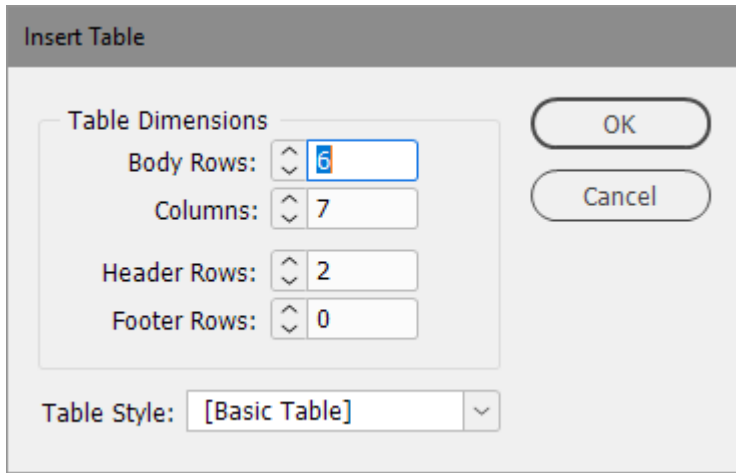


- e) If necessary, in the **Control** panel, select the center box of the **Reference Point**. 
- f) In the document window on page 2, underneath the existing text frame, draw a rectangle with the following values:
 - **X = 2.455**
 - **Y = 4.125**
 - **W = 4.5**
 - **H = 2.312**

3. Create a table in the text frame.


- a) Select the **Type** tool.
- b) In the document window, click in the rectangle to place the insertion point.
- c) Select **Table→Insert Table**.
- d) In the **Insert Table** dialog box, in the **Table Dimensions** section, in the **Body Rows** field, type **6**
- e) In the **Columns** field, type **7**

- f) In the **Header Rows** field, type **2**



- g) Select **OK** to create a table with the specified settings.

4. Merge cells in the header row.

- a) With the **Text** tool, click and drag to highlight the top header row.
- b) In the **Control** panel, select the **Merge cells** button. 

5. Add text to the header rows.

- a) In the top header row, type **May** and then press **Tab**.
- b) In the first cell of the second header row, type **Sun** and press **Tab**. In the remaining cells of the second header row, type the following, pressing **Tab** between each entry:
- **Mon**
 - **Tues**
 - **Wed**
 - **Thurs**
 - **Fri**
 - **Sat**

6. Add text to the body rows.

- a) In the cell directly below **Tues**, type **1** and press **Tab**.
Make sure that you select the correct cell, or the dates on your calendar will be off.
- b) Continue typing the numbers up to **31** pressing the **Tab** key to move to the next cell after each.

7. Delete a row.

- a) With the **Text** tool, in the table, select the bottom body row.
- b) Right-click in the selected row and select **Delete→Row** (or press **Ctrl+Backspace**).

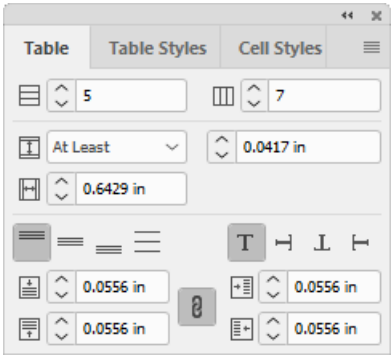
8. With the **Text** tool, highlight the five body rows containing the calendar dates.

9. Change the font size and leading in the body rows.

- a) In the **Control** panel, in the **Font Size** text window, change the value to **9**
- b) In the **Control** panel, in the **Leading** text window, change the value to **9**

10. Change the row height of the body rows.

- a) With the five body rows still selected, select **Window→Type & Tables→Table**.



- b) In the **Table** panel, from the **Row Height** drop-down list, select **Exactly**.
 c) In the field to the right of the **Row Height** drop-down list, type **0.327**



- d) If necessary, close the **Table** panel.

11.Add the curtain time information to the table cells.

- a) Select in the cell for Friday the 4th. Add a return after **4** and type **8 pm**
 b) Select the text **8 pm** and press **Ctrl+C** to copy it.
 c) In the cell for Saturday the 5th, add a return after the **5** and press **Ctrl+V** to paste.
 d) Continue pasting in this manner for all the Fridays and Saturdays up to the 26th.

May						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
		1	2	3	4 8 pm	5 8 pm
6	7	8	9	10	11 8 pm	12 8 pm
13	14	15	16	17	18 8 pm	19 8 pm
20	21	22	23	24	25 8 pm	26 8 pm
27	28	29	30	31		

12.Save the file as *My Postcard.indd*

TOPIC B

Format a Table

You've built a table that efficiently displays your data. Now it's time to format it so that it fits the style of the rest of your document. In this topic, you will format a table.

Cell Options Dialog Box

The **Cell Options** dialog box has various tabs that enable you to include the style name and format cells accordingly.

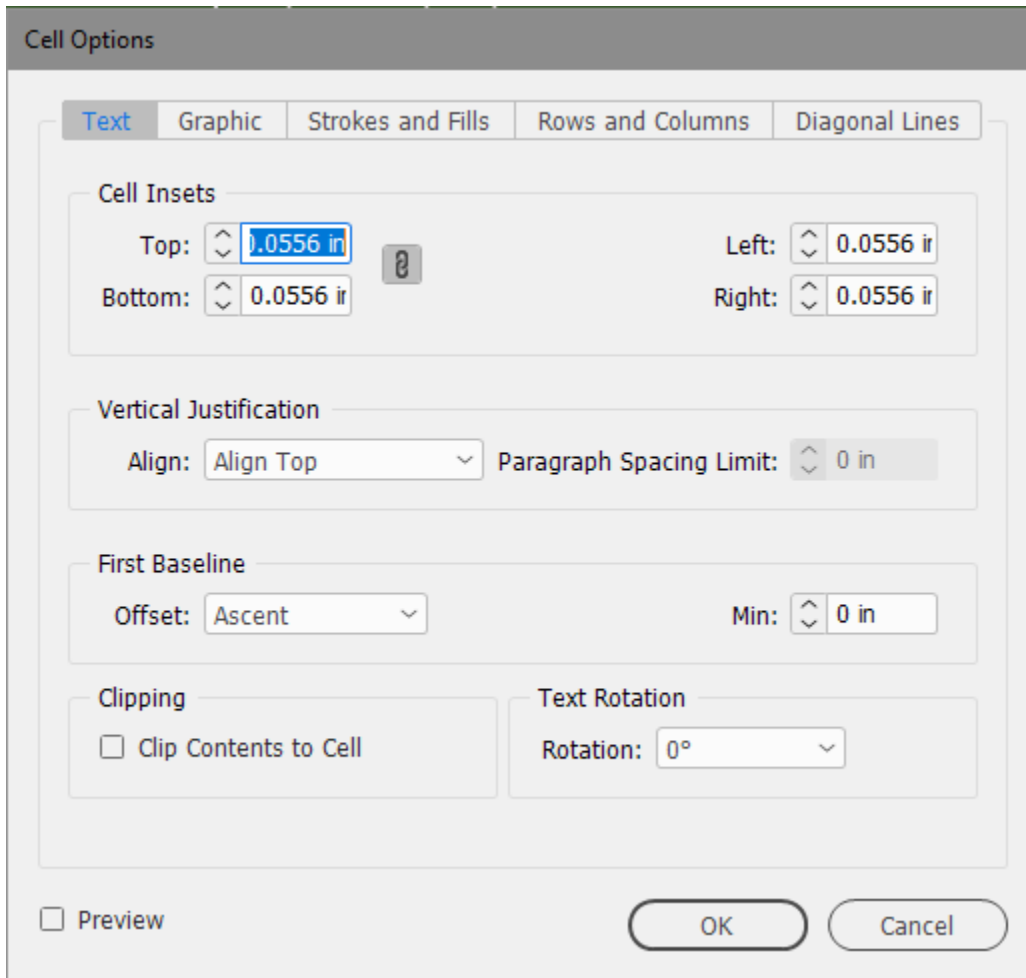


Figure 5–4: The Cell Options dialog box.

Tab	Allows You To
Text	Specify cell settings. You can apply vertical justification and specify offset settings. The options on this tab also let you rotate text and cut the contents of a cell.
Graphic	Specify the cell inset spacing for cells that contain graphic.
Strokes and Fills	Specify different settings for weight, type, and color of strokes in a cell. You can apply a different color and tint percentage for the fill.

<i>Tab</i>	<i>Allows You To</i>
Rows and Columns	Specify the row height and column width. You can also specify the different settings for the location of the starting rows in cells.
Diagonal Lines	Select the desired diagonal line by using the buttons available. This tab also lets you specify the settings for the weight, type, color, and tint of the diagonal lines.

Table Styles and Cell Styles Panels

The **Table Styles** panel provides a collection of table formatting attributes, such as table borders and spacing, row strokes, column strokes, and fills that can be created and applied to a table in a single step. Similarly, the **Cell Styles** panel provides a range of cell formatting attributes, such as paragraph styles, cell insets, strokes, fills, and diagonal lines. InDesign lets you create and apply table and cell styles to the tables in documents. You can also import table and cell styles from another document into the active document. A group of related styles can be grouped into folders in the **Table Styles** and **Cell Styles** panels.

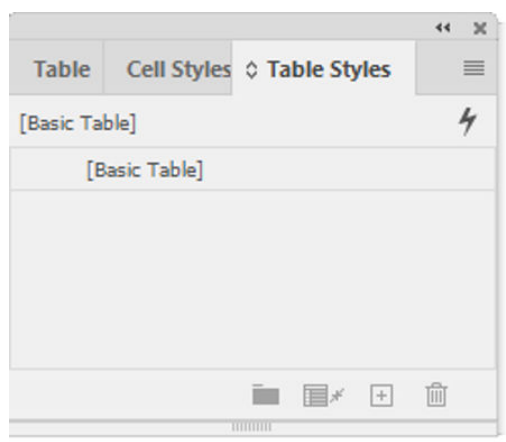
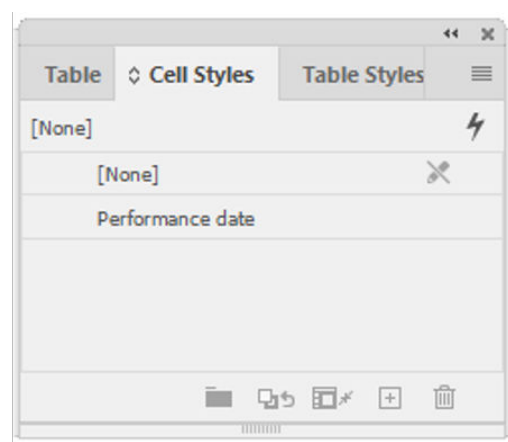


Table Styles Panel



Cell Styles Panel

Figure 5-5: Table Styles and Cell Styles panels.

Link Files

When bringing Microsoft® Excel® spreadsheet data into an InDesign table, you can use **Preferences** to tell InDesign that you want the spreadsheet to come in as a linked file. The advantage of this is that when changes are made to the spreadsheet, those changes will automatically be made and the formatting will automatically be adjusted in the InDesign table, making it unnecessary to make those changes manually. When changes are made in the spreadsheet, you will automatically be notified in the **Links** panel. All you have to do is double-click the notification for the changes to come down from Excel.

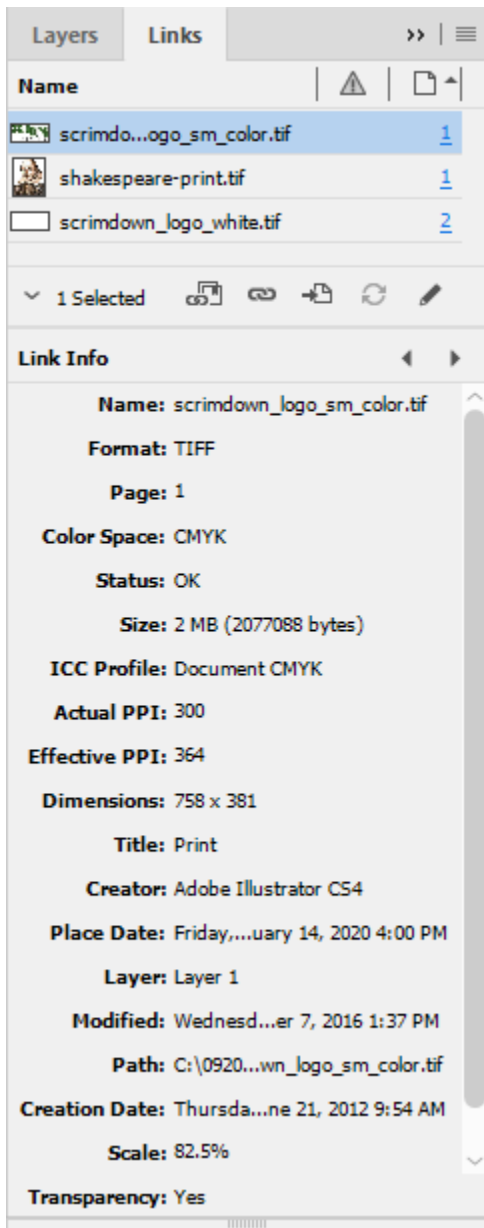


Figure 5-6: The Links panel.



Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Format a Table.

ACTIVITY 5–2

Formatting a Table

Before You Begin

My Postcard.indd is open.


Scenario

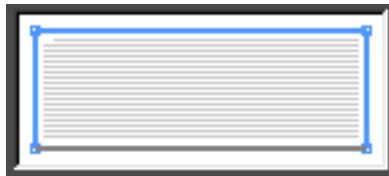
The calendar on the back of the postcard still needs some refining. You decide to add strokes and fills to give the information more impact.

1. Modify the stroke on the table cells.

- In the document window, in the table, select the second header row containing the days of the week.
- Right-click, and from the menu, select **Cell Options→Strokes and Fills**.
- In the **Cell Options** dialog box, on the **Strokes and Fills** tab, in the **Cell Stroke** section, from the **Color** drop-down list, select **Scrimdown Green**.
- From the **Weight** drop-down menu, select **1 pt** if necessary.
- Select **OK**.
- Select the five body rows of calendar dates.
- Right-click, and from the menu, select **Cell Options→Strokes and Fills**.
- In the **Cell Options** dialog box, on the **Strokes and Fills** tab, in the **Cell Stroke** section, in the **Color** drop-down list, select **Scrimdown Green**.
- In the **Weight** drop-down list, verify that **1 pt** is selected and select **OK**.

2. Remove the stroke from the header row and center the table title.

- Select the entire first header row containing the word "May."
- In the **Control** panel, select the **Align center** icon  to center the word "May" in the top row.
- With the header row still highlighted, right-click the table, and from the menu, select **Cell Options→Strokes and Fills**.
- In the **Cell Options** dialog box, on the **Strokes and Fills** tab, in the **Cell Stroke** section, in the cell diagram, deselect the bottom line by clicking it.




- If necessary, from the **Color** drop-down list, select **None**.
- Select **OK**.
- If necessary, press **Ctrl+H** to hide frame edges. Verify that the cells of the table have a green stroke.

3. Add fills to the cells that are performance dates.

- Select the cell for Friday the 4th.
- Select **Window→Type & Tables→Table** to display the **Table** panel.
- From the **Table** panel options menu, select **Cell Options→Strokes and Fills**.

- d) In the **Cell Options** dialog box, on the **Strokes and Fills** tab, in the **Cell Fill** section, from the **Color** drop-down list, select the yellow swatch (with the C = 0, Y = 100, M = 0, K = 0 values), and in the **Tint** box, type **40**
- e) Select **OK**.

4. Create a cell style and apply it.

- a) With the Friday the 4th cell selected, expand the **Table** panel group and select the **Cell Styles** tab.
- b) In the **Cell Styles** panel, at the bottom, select the **Create new style** button. 
- c) In the **Cell Styles** panel, double-click **Cell Style 1** to open the **Cell Style Options** dialog box.
- d) In the **Cell Style Options** dialog box, in the **Style Name** box, type **Performance date** and select **OK**.
- e) Select the cell for Saturday the 5th and in the **Cell Styles** panel, select **Performance date** to apply it to the cell.
- f) Apply the **Performance date** style to the remaining performance date cells in the table.

May						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
		1	2	3	4 8 pm	5 8 pm
6	7	8	9	10	11 8 pm	12 8 pm
13	14	15	16	17	18 8 pm	19 8 pm
20	21	22	23	24	25 8 pm	26 8 pm
27	28	29	30	31		

- g) Close the **Cell Styles** panel.

5. Save and close the file.

Summary

In this lesson, you built a new table to present content in an organized and efficient manner. As the requirements changed, you learned how to modify a table to accommodate the data. Finally, you learned to create and apply table and cell styles to format a table to keep it consistent with the style of the document.

Tables are an extremely useful layout tool. Can you come up with some other ways in which creating a table in your document would solve a layout problem?

What modification options do you think will be best to use to improve your table layouts?



Note: Check your CHOICE Course screen for opportunities to interact with your classmates, peers, and the larger CHOICE online community about the topics covered in this course or other topics you are interested in. From the Course screen you can also access available resources for a more continuous learning experience.

6

Preparing a Document for Delivery

Lesson Time: 45 minutes

Lesson Introduction

Creating a good looking document is not enough. Now you need to make the final preparations for delivering it to its intended audience. There are many things to consider in making these preparations, and Adobe® InDesign® (2020) has you covered for every scenario. In this lesson, you will prepare a document for delivery.

Lesson Objectives

In this lesson, you will:

- Resolve errors in a document.
- Export files for printing.

TOPIC A

Resolve Errors in a Document

Your document is complete but you need to make sure that there are no errors that may delay things later. InDesign can review the file and identify trouble spots that need your attention before you hand it off. In this topic, you will resolve errors in a document.

Preflight

Preflight is the process of performing quality checks on a document before printing it. The **Preflight** command checks a document for problems and alerts you to issues you might not have noticed.

Live Preflight

By default, InDesign performs live preflight by continuously checking a document for preflight errors as you work on the document. You can opt to turn off live preflight and manually check the document for preflight errors. This can be done in the **Preflight** panel by unchecking the **On** check box.

The Preflight Panel

The **Preflight** panel provides the information you need to fix errors in the document. The **Error** window identifies the error. When you select an error in the **Error** window, you can get more details about the problem and how to fix it in the **Info** window.

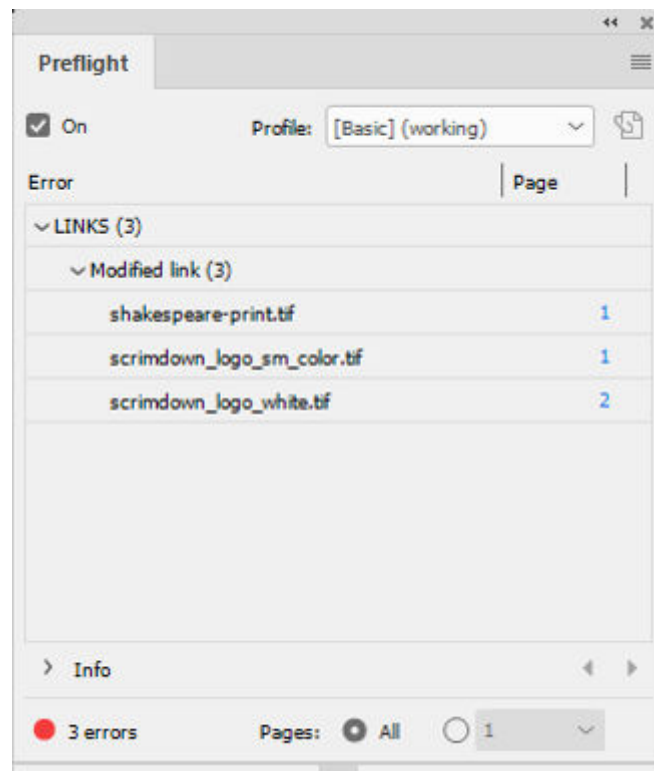


Figure 6–1: The Preflight panel.

The Print Dialog Box

The **Print** dialog box options help you set up print jobs. These options can be customized and saved as presets.

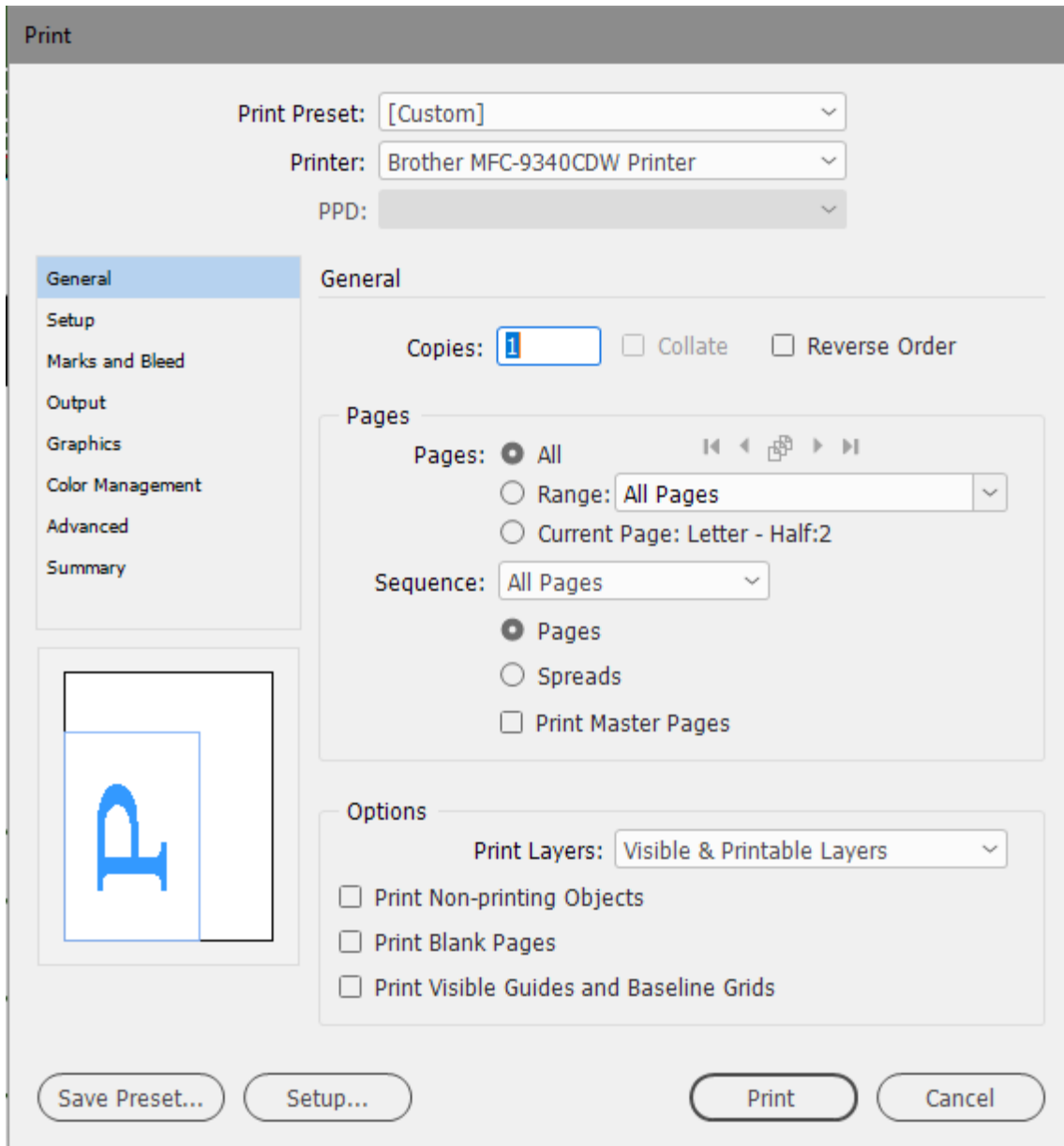


Figure 6–2: The Print dialog box.

<i>Print Option</i>	<i>Description</i>
General	Controls the number of copies, page sequence, and presents useful offers for designers. These options include the ability to print master pages, visible guides, baseline grids, non-print objects, and blank pages.
Setup	Controls the paper size, orientation, scaling, position of images on the page, and provides options for printing thumbnails.
Marks and Bleed	Adds printer marks. You can separately set the bleed distance at each edge.

Print Option	Description
Output	Creates a composite or color separation. When printing separations, you can control prepress settings such as trapping and screening.
Graphics	Achieves accurate color matches between the on-screen appearance of the document and the printed version.
Color Management	Allows you to create and manage printer profiles to customize the output color.
Advanced	Specifies Open Prepress Interface (OPI) image replacement settings, substituting low-resolution proxy images for the high-resolution ones for working in InDesign and reducing network traffic, but printing the high-resolution versions. It also controls how InDesign handles gradients and transparency.
Summary	Summarizes the settings that you chose in other categories, and allows you to save the information in a text file that you can keep for future reference.



Access the Checklist tile on your **CHOICE** Course screen for reference information and job aids on **How to Resolve Errors in a Document**.

ACTIVITY 6–1

Resolving Errors in a Document

Data Files

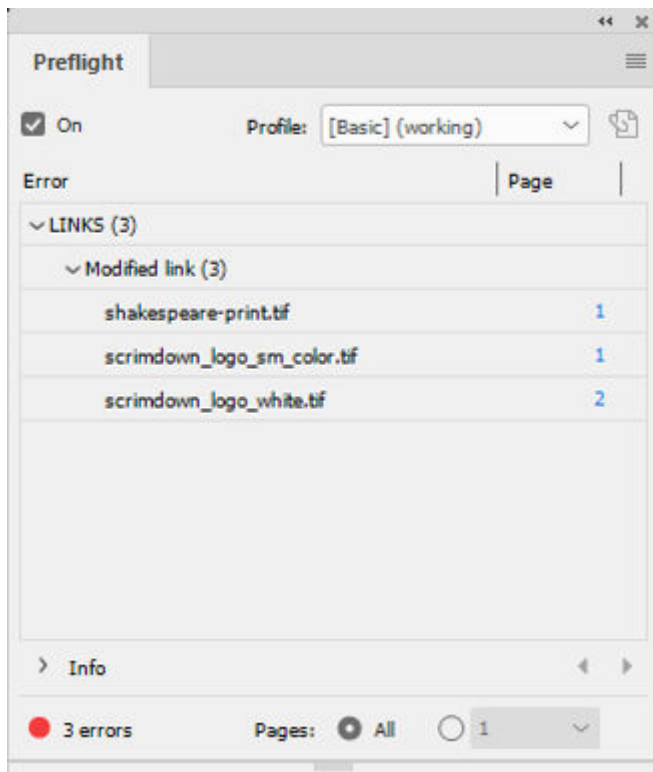
C:\092023Data\Preparing a Document for Delivery\Postcard Lesson 6.indd

C:\092023Data\Preparing a Document for Delivery\images\shakespeare-print.tif

Scenario

The postcard is finished and needs to go to the printer before any of the other pieces. To avoid delays once it has been sent to print, you decide it's best to check that all the fonts and links to images are correct and up-to-date.

1. Browse to the folder C:\092023Data\Preparing a Document for Delivery and open the file **Postcard Lesson 6.indd**.
2. In the warning message dialog box, select **Don't Update Links**.
3. Use the **Preflight** panel to view an error in the document.
 - a) Select **Window→Output→Preflight**.
 - b) In the **Preflight** panel, verify that the **On** check box is checked.



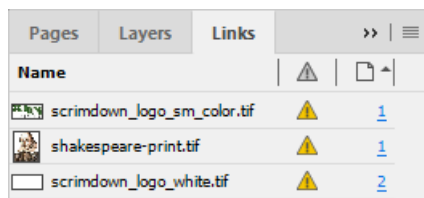
- c) In the **Preflight** panel, at the bottom, notice that the **Preflight** icon is red, indicating that one or more errors exists.




- d) In the **Error** section, select the arrow next to **LINKS (3)** to expand it.
 e) Expand **Modified link (3)**.
 f) Double-click **shakespeare-print.tif**.
 g) At the bottom of the **Preflight** panel, expand **Info** to view the link problem and how to fix it.

4. Use the **Links** panel to fix the errors in the document.

- a) If necessary, from the menu bar, select **Window→Links**.
 b) Verify that **scrimdown_logo_sm_color.tif**, **shakespeare-print.tif**, and **scrimdown_logo_white.tif** all have warning triangles.



- c) Select **shakespeare-print.tif** and then select the **Update Link** button. 
 d) Do the same thing to update the links for the other two files.
 e) In the **Preflight** panel, verify that the **Preflight** icon is now green, indicating that there are no errors.



5. Save the file as *My Postcard Lesson 6.indd*

6. Close the **Preflight** panel, collapse the **Links** panel, and close the file.

TOPIC B

Export Files for Printing and for the Web

The finished document has been checked for errors and packaged up with its required files. Before sending it off to the printer, it's good practice to export it as a PDF file. In this topic, you will export files for printing.

Acrobat PDF

It's not safe to assume that every commercial printer is capable of working right from an InDesign file. Portable Document Format (PDF) provides a versatile way to distribute files because any computer on any platform can read PDF files with either the free Adobe® Reader® application or the full version of Adobe® Acrobat®. PDF files can be read through a web browser, and when printed from the browser, they retain the original document's print quality. This is a popular method of supplying files to a printer because PDF files are usually smaller in size and easier to print than the original InDesign file.

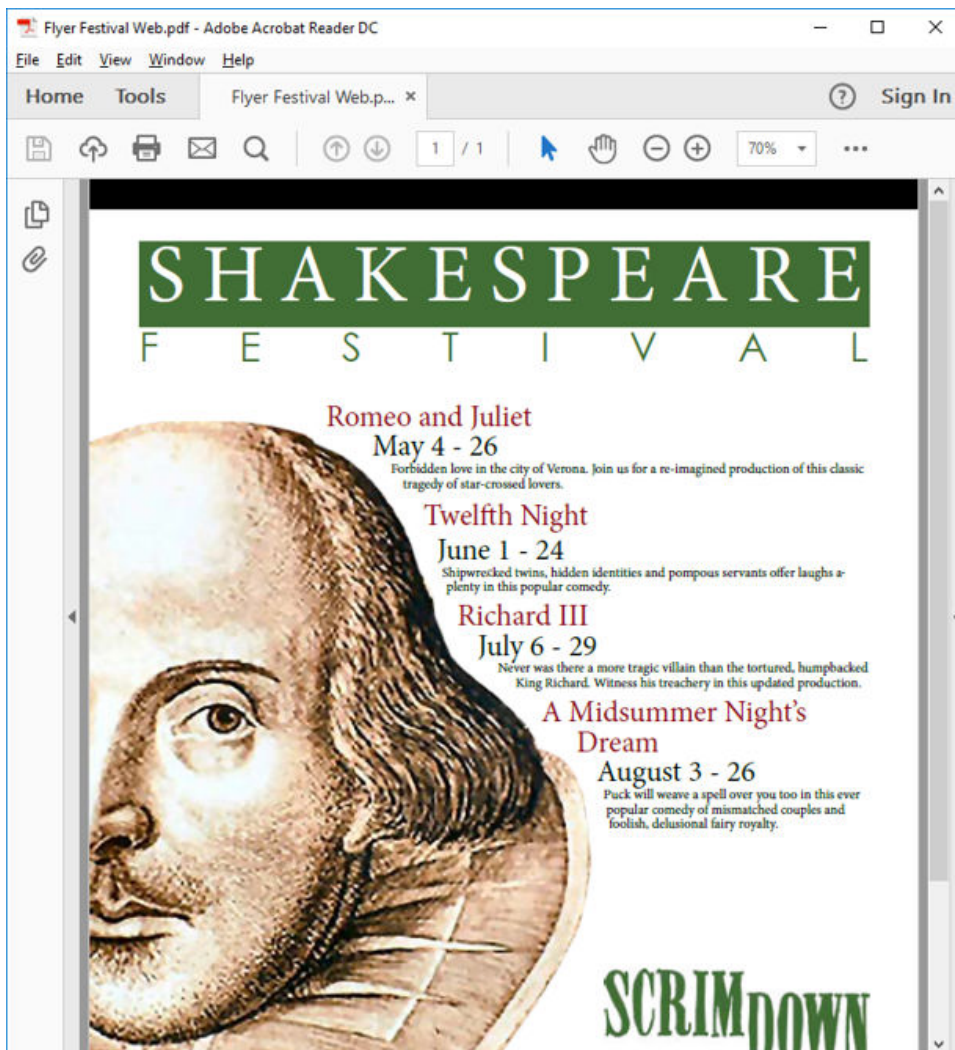


Figure 6-3: Example of an Acrobat PDF.

PDF Presets

PDF presets are groups of settings that affect the process of creating a PDF.

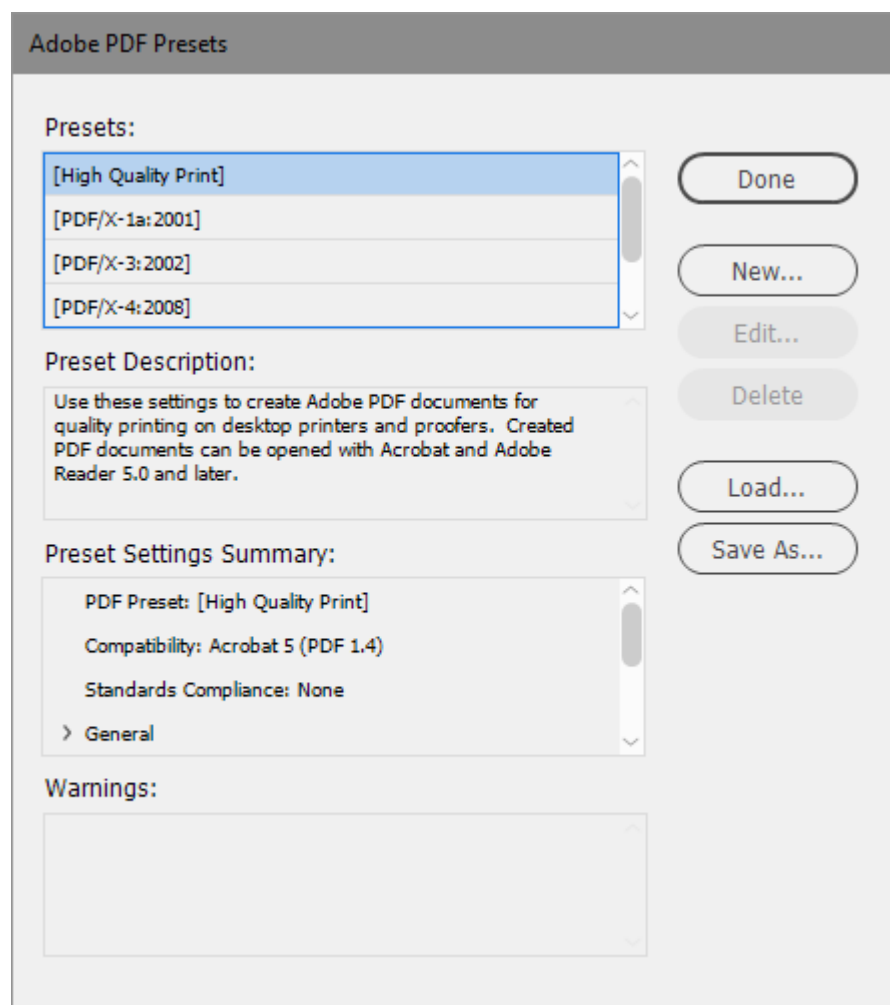


Figure 6–4: *The Adobe PDF Presets dialog box.*

The **New PDF Export Preset** dialog box can be used to modify the settings for a specific setup. PDF presets are saved with InDesign preferences so that they are available when printing any document.

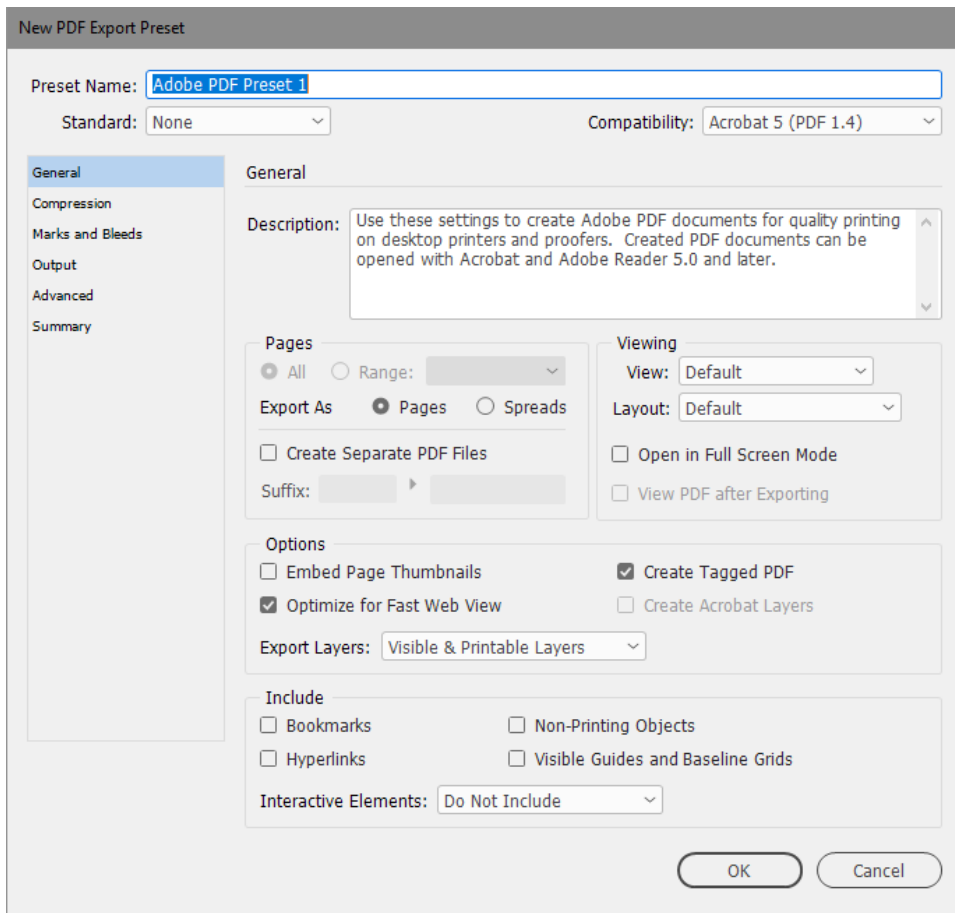


Figure 6–5: The New PDF Export Preset dialog box.



Note: Because PDF presets are designed for use across multiple documents, document-specific settings, such as security settings, can't be saved in PDF presets.

Export Files for the Web

There are different things to consider when you plan to deliver your content online. Luckily, those considerations are accounted for when you export for the web using InDesign.

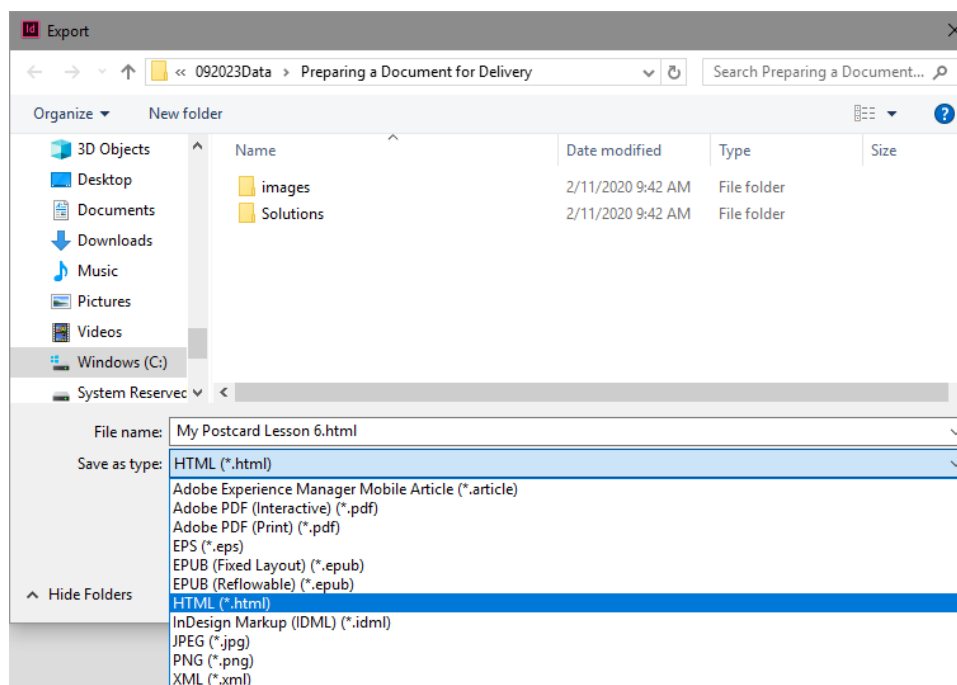


Figure 6–6: Exporting files for the web.

Packaging

Packaging is the process of assembling a primary InDesign file with all of its supporting files and placing them in one folder. Supporting files include fonts and graphics. This ensures that a commercial printer receives all the necessary files to print the document. On the **Summary** tab, you can select the **Create Printing Instructions** check box if you want to create specific printing instructions for your package.

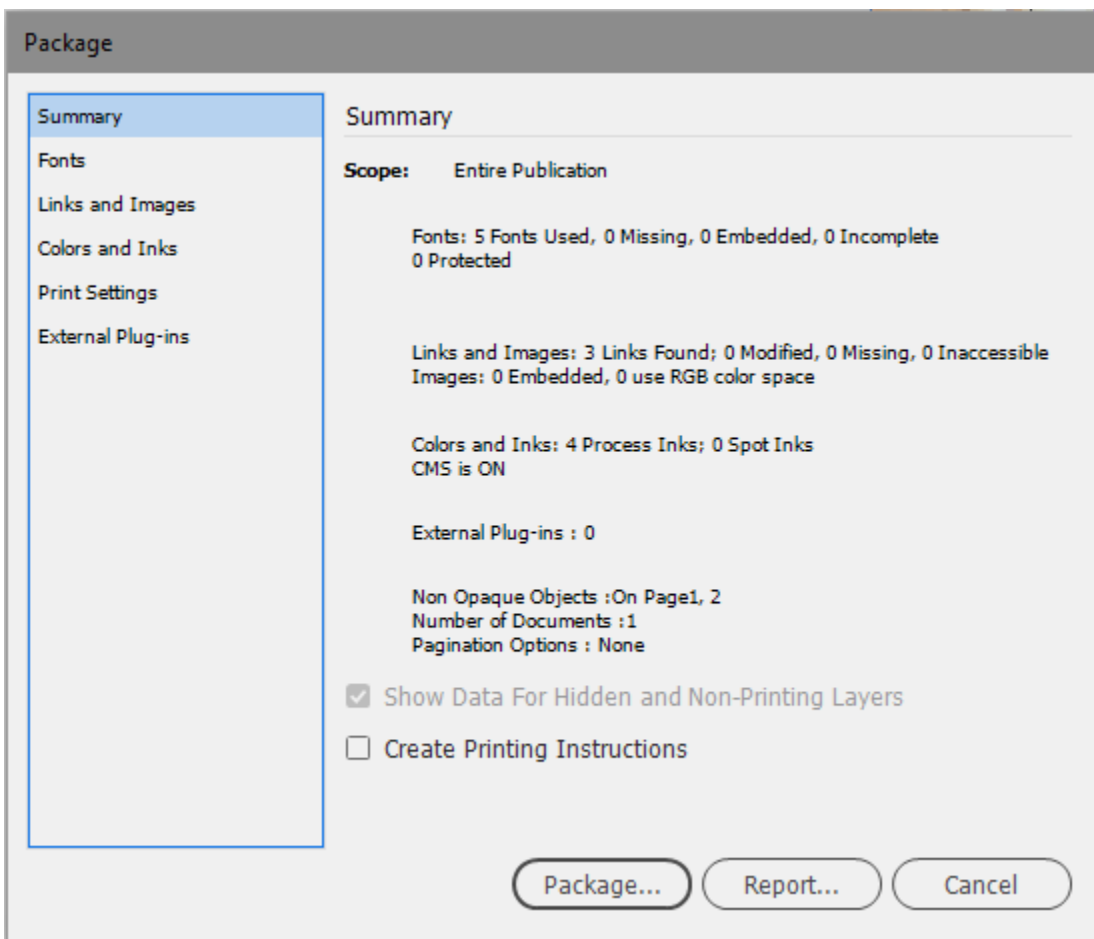


Figure 6–7: The Package dialog box.

Document Installed Fonts

When an InDesign file is packaged by using the **Package** command, a folder with the name **Document fonts** is created. This folder stores the fonts used in that particular document other than the standard installed fonts. When the document is opened from the same parent folder that the **Document fonts** folder is located in, InDesign will automatically install these fonts temporarily into your system. The fonts in the **Document fonts** folder replace any font of the same PostScript name that might already be installed. Because the document fonts replace only the fonts within the document, fonts installed by one document are not available to other documents. When the document is closed, the document fonts will automatically be uninstalled.

Bookmarks

A bookmark is a text entry that appears in the **Bookmarks** panel within Adobe Acrobat or Adobe Reader. Before exporting an InDesign file as a PDF, the **Bookmarks** panel is used to specify bookmarks for the exported PDF file. This makes your document interactive. Users, viewing the file in Adobe Acrobat or Adobe Reader, can select a specific bookmark to navigate directly to the section they want to view.

The PDF Comments Panel

After you create a PDF using InDesign, you will likely share your PDF with others to gather feedback. The **PDF Comments** panel allows you to import comments from reviewed PDFs. Here,

you can mark comments as resolved or unresolved. You can also select a comment to identify the section in the document where the comment applies.



Figure 6–8: The PDF Comments panel.

	Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Export Files for Printing and the Web.
--	--

ACTIVITY 6–2

Exporting Files for Printing and the Web

Data File

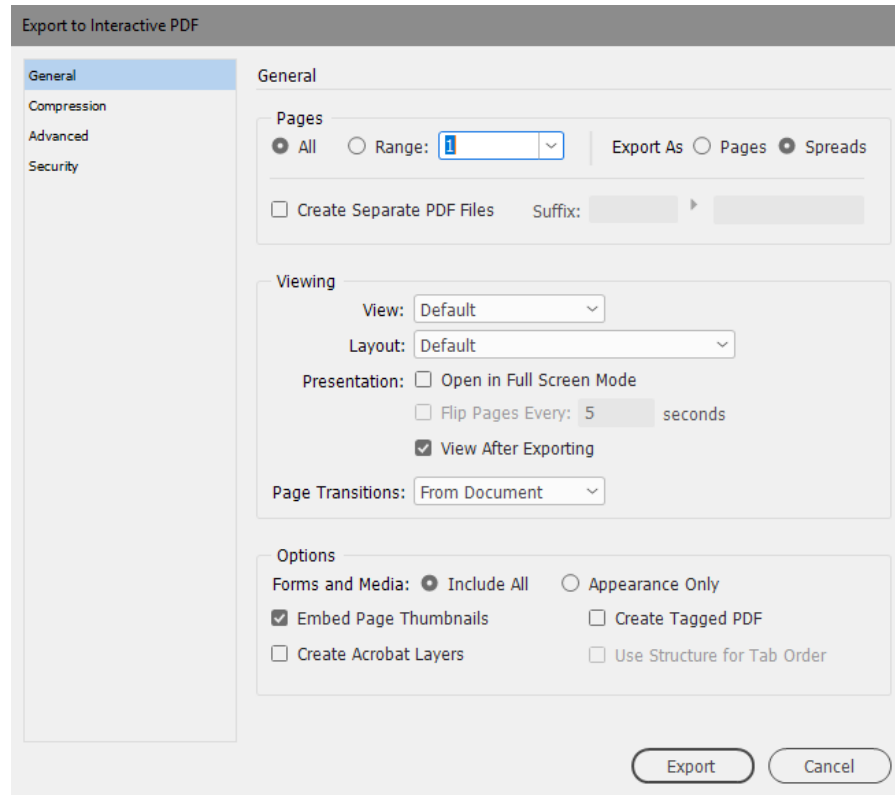
C:\092023Data\Preparing a Document for Delivery\Flyer.indd

Scenario

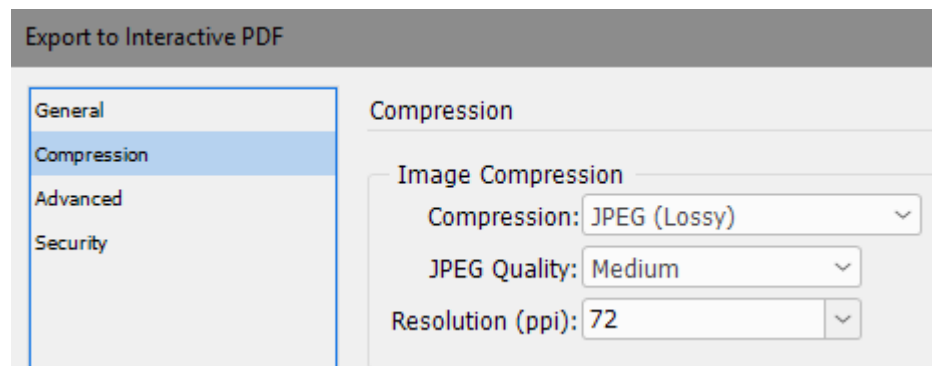
While the postcard is at the printer, the marketing department would like to start generating interest in the festival as soon as possible. To do this, they'd like a digital version of the flyer uploaded to the website. You realize that this can be done easily in InDesign. They also want you to prepare the file for print, so you include a PDF version of the document in the event that the printer is not able to work with InDesign files.

1. Browse to the folder **C:\092023Data\Preparing a Document for Delivery** and open the file **Flyer.indd**.
2. If you receive a warning to update links, select **Update Modified Links**.
3. Export a PDF file for the web.
 - a) On the **Menu** bar, select **File→Export** (or press **Ctrl+E**).
 - b) In the **Export** dialog box, navigate to **C:\092023Data\Preparing a Document for Delivery**.
 - c) In the **File name** box, type **Flyer Festival Web**
 - d) In the **Save as type** box, select **Adobe PDF (Interactive)**.
 - e) Select **Save**.

- f) In the **Export to Interactive PDF** dialog box, review the settings but don't make any changes.



- g) Select the **Compression** tab. Notice that the compression is set to **JPEG (Lossy)** and the resolution is **72 ppi**.



- h) Select **Export**.
i) If necessary, close the **PDF Comments** panel.

4. View the PDF file.

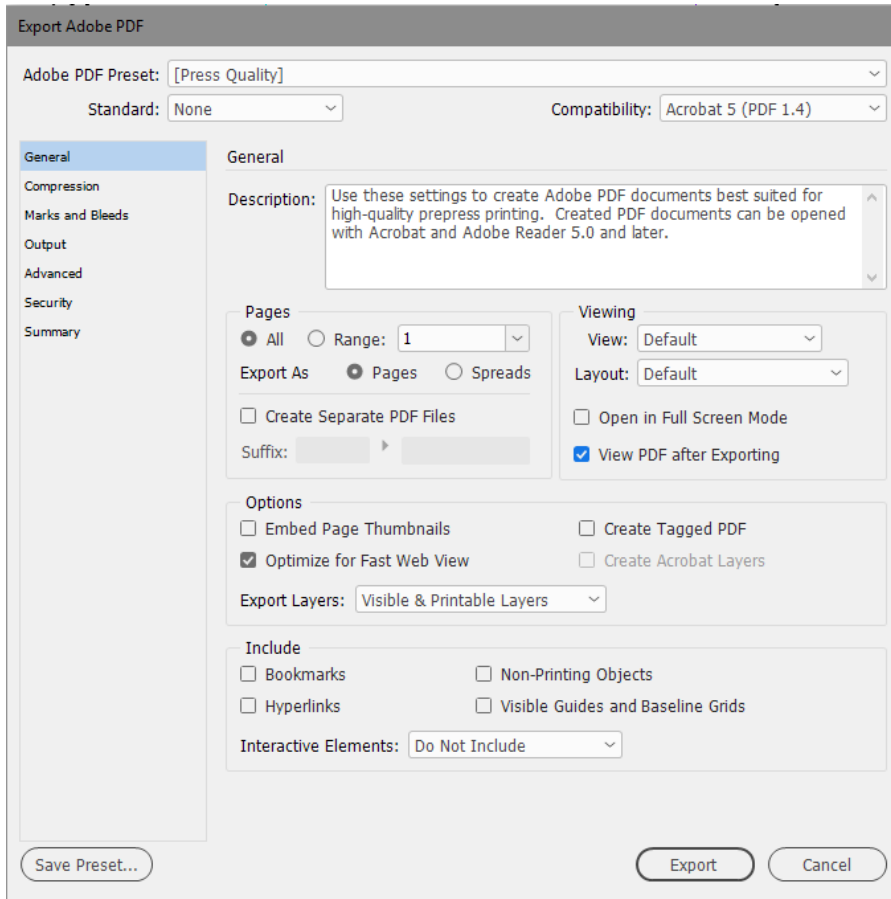
5. Close the PDF file.

6. Check the PDF file size.

- a) In File Explorer, navigate to the **C:\092023Data\Preparing a Document for Delivery** folder.
b) Verify that the file size of **Flyer Festival Web.pdf** is less than **200 KB**.
c) Close File Explorer.

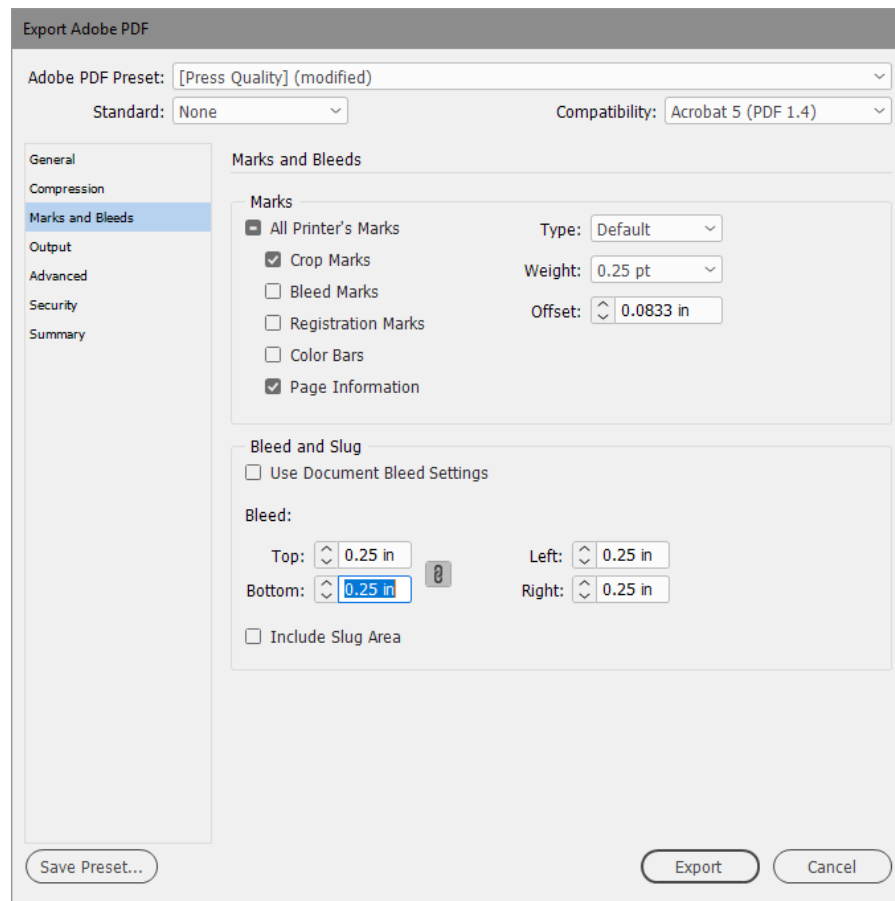
7. Export the file as a PDF for print.

- On the **Menu** bar, select **File→Adobe PDF Presets→[Press Quality]**.
- In the **Export** dialog box, verify that **C:\092023Data\Preparing a Document for Delivery** is the selected destination.
- In the **File name** box, type *Flyer Festival Print*
- Select **Save**.
- In the **Export Adobe PDF** dialog box, under **General**, in the **Pages** section, verify that the **All** radio button is enabled.
- In the **Viewing** section, check the **View PDF after Exporting** check box.



- In the left pane, select **Marks and Bleeds**. In the **Marks** section, check the **Crop Marks** and the **Page Information** check boxes.

- h) In the **Bleed and Slug** section, with the **Make all settings the same** button  enabled, click in the **Top** field, type **0.25** and press **Tab**.



- i) Select **Export**.



Note: If you receive any warning messages about updating links, do not update. If you receive any warning messages about transparency blend, select **OK**.

8. View the PDF file.

- Verify that there are crop marks that allow for bleeds.
- Verify that page information is displayed.
- Close the PDF file.

9. Save the file as **My Flyer.indd** and close all files.

Summary

In this lesson, you used the Preflight feature to check your document for errors. You created a PostScript preset in order to print a proof for review. Following that, you learned how to package the file in preparation for delivery to a printer. Lastly, you learned about the usefulness of exporting PDF files.

The features that InDesign offers for preparing a file for delivery are extremely useful and save you from potential headaches. Can you think of possible scenarios that can be avoided by using these features?

In your environment, are you more likely to export files for print or web?



Note: Check your CHOICE Course screen for opportunities to interact with your classmates, peers, and the larger CHOICE online community about the topics covered in this course or other topics you are interested in. From the Course screen you can also access available resources for a more continuous learning experience.

Course Follow-Up

In this course, you learned how to use the tools and features of Adobe InDesign (2020) to create professional-looking documents for printing and for the web. These tools and features will save you time and make your workflow more efficient.

What's Next?

Adobe® InDesign® (2020): Part 2 is the next course in this series. The focus of this course will be on how to use the more advanced features and tools of InDesign.

You are encouraged to explore InDesign further by actively participating in any of the social media forums set up by your instructor or training administrator through the **Social Media** tile on the CHOICE Course screen.

A

Mapping Course Content to Print & Digital Media Publication Using Adobe InDesign CC Exam

Adobe is revising Creative Cloud certifications and plans to release updated exams in the first half of 2020.

Currently, through **Certiport.com**, Adobe offers the Adobe Certified Associate (ACA) certification program. Candidates who wish to obtain Adobe Certified Associate (ACA) - InDesign certification must pass the associated exam.

To assist you in your preparation for the exam, Logical Operations has provided a reference document that indicates where the exam objectives are covered in the Logical Operations *Adobe® InDesign® (2020)* courseware.

The exam-mapping document is available from the **Course** page on CHOICE. Log on to your CHOICE account, select the tile for this course, select the **Files** tile, and download and unzip the course files. The mapping reference will be in a subfolder named **Mappings**.

Best of luck in your exam preparation!

B

Productivity Enhancements

Appendix Introduction

In this appendix, you will explore the additional tools and options available in Adobe® InDesign® (2020).

TOPIC A

Additional InDesign Tools

There are many other options that make Adobe InDesign (2020) a useful tool. In this topic, you will learn more about these other options.

Split Window

To compare two different layouts in the same document, you can split the active window. Use the two panes to view alternative layouts side by side.

Split Layout View

- Select the button in the lower-right corner of the document window.
- Select **Window→Arrange→Split Window**.

Recently Used Fonts

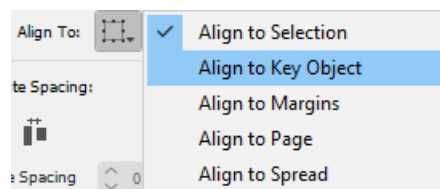
To find fonts easily and reduce scrolling, view the recently used fonts at the top of the **Font** pop-up and **Type→Font** menus.

- Specify the number of recent fonts to display under **Edit→Preferences→Type**. On the **Type** tab of the **Preferences** dialog box, in the **Number of recent fonts to display** box, enter the desired number.
- By default, the recently used fonts are displayed in chronological order. To display them in alphabetical order, in the **Preferences** dialog box, on the **Type** tab, check **Sort Recent Fonts List Alphabetically**.

Align to Key Object

An additional option is available for distributing objects in the **Align** panel.

1. Select the objects to distribute.
2. In the **Align** panel (**Window→Object & Layout→Align**), from the **Align To** list, select **Align To Key Object**.



3. The key object appears with a thick border. Click another object to select it as the key object.

Save Backward to Earlier Versions

To open an InDesign document in a previous version, or to send it to someone who has not yet upgraded, save the document in the **InDesign Markup Language (IDML)** format. IDML files are supported by InDesign CS4 or later. Features not supported by the earlier version will not work.

The option to save documents to earlier versions is now available from the **Save** and **Save As** dialog boxes.

1. Select **File**→**Save As**.
2. From the **Save As Type** list, select **InDesign CS4 or later (IDML)**.

Export and Proof Grayscale PDFs

You can now proof and export designs as grayscale PDFs. For example, use this feature to quickly export your layout for grayscale printing. The digital publication remains full color, and you can avoid maintaining separate layouts for grayscale and color outputs.

Use **Proof Setup (View**→**Proof Setup**→**Custom**) to specify grayscale proof options. In the **Device to Simulate** drop-down list, select a **Dot Gain** or **Gamma** destination. After you've set up the proof, select **View**→**Proof Colors** to toggle between grayscale and color output.

You can also export a grayscale PDF from within InDesign. All page items, regardless of their original color space, are converted to grayscale while exporting to PDF.

1. Select **File**→**Export** and select **Adobe PDF (Print)**.
2. Save the file to the desired location and file name.
3. In the **Export Adobe PDF** dialog box, select the **Output** tab.
4. In the **Color Conversion** drop-down list, select **Convert To Destination**.
5. In the **Destination** drop-down list, select a **Dot Gain** or **Gray Gamma** destination and then select **Export**.



Note: Grayscale destinations are not available under the PDF/X-1a standard. The standard supports only CMYK intents. Similarly, PDF/X-2 or PDF/X-3 standards do not support Gray Gamma destinations.

Complex Calculations in Panels and Dialog Boxes

You can now perform complex calculations within the text fields in panels and dialog boxes. Enter a mathematical expression by using mathematical operators, for example, $120p0/2 + 10$.



Access the Checklist tile on your **CHOICE** Course screen for reference information and job aids on **How to Export to PNG**.



Access the Checklist tile on your **CHOICE** Course screen for reference information and job aids on **How to Use Export Enhancements**.

Mastery Builders

Mastery Builders are provided for certain lessons as additional learning resources for this course. Mastery Builders are developed for selected lessons within a course in cases when they seem most instructionally useful as well as technically feasible. In general, Mastery Builders are supplemental, optional unguided practice and may or may not be performed as part of the classroom activities. Your instructor will consider setup requirements, classroom timing, and instructional needs to determine which Mastery Builders are appropriate for you to perform, and at what point during the class. If you do not perform the Mastery Builders in class, your instructor can tell you if you can perform them independently as self-study, and if there are any special setup requirements.

Mastery Builder 1–1

Exploring the InDesign Interface

Activity Time: 10 minutes

Before You Begin

InDesign is open.

Scenario

Your new job requires that you update all the old marketing materials. You decide to use Adobe InDesign (2020) for this task. You're not familiar with the software so you begin to explore it.

1. Open Adobe InDesign.
 2. Use the **Workspace Switcher** to switch to the **Typography** predefined workspace. Observe the available interface elements, and then switch back to the **Essentials Classic** workspace.
 3. Observe the **Tools** panel. Use the **Expand** and **Collapse** buttons to switch between a single column and double column for the **Tools** panel.
 4. Change the unit of measure to **Picas** and then back to **Inches**.
 5. Display and then collapse the **Layers** panel.
 6. Position the **Layers** and **Links** panels below the **Swatches** panel.
 7. Save your workspace as ***My Marketing Workspace***
-

Mastery Builder 2–1

Creating a Brochure

Activity Time: 10 minutes

Data Files

C:\092023Data\Designing a Document\woman_shore.jpg


C:\092023Data\Designing a Document\climber.jpg

C:\092023Data\Designing a Document\runners_feet.jpg

C:\092023Data\Designing a Document\soccer_feet.jpg

Scenario

You need to create a new brochure for your sporting goods company that features text and photos. You can compare your completed documents to the files in C:\092023Data\Designing a Document\Solutions.

1. Create a document by using these specifications:
 - a) **Number of Pages:** 4
 - b) **Width:** 8.5 inches
 - c) **Height:** 11 inches
 - d) **Orientation:** Portrait
 - e) **Margins:** 0.5 inches
2. In the **Control** panel, ensure that the reference point locator is set to the top-left corner. 
3. On page 2, draw a graphic frame with dimensions of **X=0, Y=0, W=8.5, H=5.5**. Import the image file **woman_shore.jpg**. Fit the content to the frame so that it fills the entire region.
4. On page 2, draw a text frame with dimensions of **X=1.5, Y=0.5, W=4.5, H=1.5**.
5. In the text frame, type *"Walking is the best possible exercise. Habituate yourself to walk very far." - Thomas Jefferson*. Change the font size to 21 pt.
6. On page 2, draw another text frame with dimensions of **X=3.1, Y=5.7, W=4.9, H=2.25**. Import text from the **Brochure Text.doc** file into the text frame.
7. For the larger text frame on page 2, specify the number of columns as **2** and gutter as **0.1667** inches.
8. On page 2, draw three graphic frames with the following specifications:
 - a) First frame: **X=0.5, Y=5.9, W=2.3, H=1.8**.
 - b) Second frame: **X=0.5, Y=8.1, W=3.5, H=2.4**.

- c) Third frame: X=4.4, Y=8.1, W=3.6, H=2.4.
 - 9. On page 2, import the image file **climber.jpg** into the first graphic frame. Adjust the positioning of the image inside the frame such that just the climber is shown.
 - 10. On page 2, import the image files **runners_feet.jpg** and **soccer_feet.jpg** into the second and third graphic frames, respectively. Fit the content to each frame to show the entire images within them.
 - 11. Save the document as ***My Brochure.indd*** and close it.
-

Mastery Builder 3–1

Customizing a Document

Activity Time: 10 minutes

Data File

C:\092023Data\Customizing a Document\Brochure L3 Start.indd

Scenario

You created a brochure for your sporting goods company and now you'd like to give it more visual appeal. You decide to change the formatting of the text and graphics. You can compare your completed documents to the files in C:\092023Data\Customizing a Document\Solutions.

1. Open the **Brochure L3 Start.indd** file from the C:\092023Data\Customizing a Document folder. If prompted to update links, select **Update Modified Links**.
2. On page 2, set the font, font style, and font size of the two paragraphs of text to **Georgia, Regular, and 10 pt**. Specify the same settings for the text on page 3.
3. On page 2, for the paragraphs of text, specify the following settings:
 - **First Line Left Indent** value as 0.25
 - **Space Before** value as 0.1
 - **Space After** value as 0.1
 - **Leading** value as 12pt
4. On page 2, for the first paragraph of text, specify **Drop Cap Number of Lines** value as 2.
5. On page 3, for the two-column text frame on top, specify the following settings:
 - **First Line Left Indent** value as 0.25
 - **Space Before** value as 0.1
 - **Space After** value as 0.1
 - **Leading** value as 12pt
6. Create a paragraph style with the name **Header** and with the following settings:
 - **Font Family** as Arial
 - **Font Style** as Bold
 - **Size** as 16 pt
 - **Horizontal Scale** of 75%
 - **First Line Indent** as 0
 - **Space Before** value as 0.25
 - **Space After** value as 0.1
 - **Character Color** as Red

7. Apply the **Header** paragraph style to the heading "Athletics For All" on page 2, and to the heading "Competition From None" on page 3.
 8. Create another paragraph style named **Bullets** with the following settings.
 - **Based on** as **No Paragraph Style**
 - **Font Family** as **Georgia**
 - **List Type** as **Bullets**
 - **Bullet Character** as •
 - **Left Indent** value as **0.1875**
 - **First Line Indent** value as **-0.1875**
 9. Apply the **Bullets** paragraph style to the text below the heading "Competition From None" on page 3.
 10. Create a color swatch named **Orange** with **C**, **M**, **Y**, and **K** values as **0**, **40**, **100**, and **0**, and then apply it to the large rectangle frame at the bottom of page 2 with **Tint** as **60**.
 11. Save the document as **My Brochure L3.indd** and close it.
-

Mastery Builder 4–1

Working with Page Elements

Activity Time: 10 minutes

Data File

C:\092023Data\Working with Page Elements\Brochure L4 Start.indd

Scenario

Images and text have been placed in the brochure, but after looking it over you decide that some things need better alignment. Also, for the sake of organization and future edits, you decide to create new layers and distribute elements of the brochure to these new layers. You can compare your completed document to the files in C:\092023Data\Working with Page Elements\Solutions.

1. Navigate to the folder C:\092023Data\Working with Page Elements and open the file **Brochure L4 Start.indd**.
2. On page 2, select the image at the top of the page and send it to the back. Then, select the orange rectangle at the bottom and send it to the back as well.
3. On page 4, select the top-right text frame, the tennis photo, and the text frame below that and align their right edges by using the **Align** panel.
4. Rename Layer 1 as **Text** and create two more layers, naming them **Images** and **Background**
5. Place the layers in the following order, from top to bottom: Images, Text, Background.
6. Place all images in the **Images** layer.
7. Place all text in the **Text** layer.
8. Place the following in the **Background** layer:
 - a) All the content on page 1.
 - b) The large image at the top of page 2.
 - c) The rectangle with the orange fill at the bottom of page 2.
 - d) The rectangle with the orange gradient fill on page 4.
9. Save the document as **My Brochure L4.indd** and close it.

Mastery Builder 5–1

Inserting a Table

Activity Time: 10 minutes

Data File

C:\092023Data\Building Tables\Brochure L5 Start.indd

Scenario

After reviewing page 3 of the brochure, you decide that the text could benefit from being converted to a table. You can compare your completed document to the file in C:\092023\Building Tables\Solutions.

1. Navigate to the folder **C:\092023Data\Building Tables** and open the file **Brochure L5 Start.indd**.
2. At the bottom of page 3, under the "Competition From None" header, remove the bulleted formatting and then convert the list to a comma-separated table.
3. Define a table style named ***Athletics*** with the following settings:
 - Table border weight: 1
 - Table border type: **Solid**
 - Fills Alternating Pattern: **Every Other Row**
 - First row fill color: **Orange**, Tint: **20%**
 - Next row fill color: **None**
4. Verify that the **Athletic** table style is applied to the table.
5. Save the document as ***My Brochure L5.indd*** and close it.

Mastery Builder 6–1

Exporting Documents

Activity Time: 10 minutes

Data File

C:\092023Data\Preparing a Document for Delivery\Brochure L6 Start.indd

Scenario

The brochure you created is ready for the printer. It will also be available on the company website. You decide to create a PDF file for the commercial printer and also one for uploading to the web. Before doing this, you review the file for errors. You can compare your completed documents to the files in the C:\092023Data\Preparing a Document for Delivery\Solutions folder.

1. Navigate to the folder **C:\092023Data\Preparing a Document for Delivery** and open the file **Brochure L6 Start.indd**. When prompted, do not update the links.
2. In the **Links** panel, correct all of the errors due to broken links.
3. Check the document for missing fonts or images. Also, check the color space used in the document.
4. Create a package folder of the document that includes only images. Name it ***My Footprint Brochure Folder***
5. Export the document as **Brochure Print.pdf** using **[High Quality Print]** preset.
6. Export the document as **Brochure Web.pdf** using **[Smallest File Size]** preset.
7. Close all documents and close InDesign.

Solutions

ACTIVITY 2–1: Establishing Project Requirements

1. With regard to producing print and web materials for the upcoming Shakespeare Festival, what aspect of managing the project do you think will be the most challenging?

A: Answers will vary. Some will point out that meeting deadlines and allocating resources are always a challenge. Some will bring up the concern of unforeseen risks that have no mitigation strategy. Some may say that the team does not have sufficient project management experience to know what to expect.

2. Among the existing team members (classmates), how might you divide up both the project management tasks listed in the topic content and the production tasks listed in the scenario?

A: Different people may volunteer to do different things, such as design flyers, write copy (text), create brochures and playbills, and more. Others may say they could manage the checkbook, schedule people's time, procure goods and services, communicate with stakeholders, and more.

ACTIVITY 2–2: Applying Design Principles

3. What is the dominant element on the page, and what role does it play in conveying the message of the flyer?

A: Answers may vary, but the consensus should be that the large image of Shakespeare immediately conveys the idea of Shakespeare plays.

4. What role does color, size, and contrast play in effectively conveying the message of the flyer?

A: Answers will vary. The contrasting colors and sizes make it easy to pick out the play titles and dates.

5. In the Scrimdown logo, what role does position play between the words "scrim" and "down"?

A: Answers may vary. Understanding that the word scrim means curtain, we can see that the word "down" is positionally lower than the word scrim, implying that the curtain is in the down and ready position. This implies that a play is about to begin.

6. What other visual hierarchy elements do you see at work in the flyer?

A: Answers will vary. The black at the bottom makes the contact info pop. The whitespace makes all the other content breathe and easy to see without being crowded. Having the text follow the contour of the image of Shakespeare is also interesting visually.

Glossary

baseline grids

On-screen alignment tools that are used to align columns of text.

contour text wrap

A type of text wrap that allows you to wrap text in the same shape as the selected frame.

document grids

On-screen alignment tools that are used to align objects.

fill

The background color used within the bounds of a graphic placeholder.

flattening

The act of merging overlapping artwork into a single merged artwork.

gradient

A combination of colors that vary continuously with a smooth transition between colors.

graphic frame

A container or placeholder that is used to place images.

grid

An on-screen alignment tool that is used to align objects or columns of text.

layers

Transparent parts of a document that are stacked.

Links panel

A panel that has a number of elements that enable you to list and track all the files placed in a document.

lists

Used to present information separately from the surrounding text.

notes

Briefly written entries or reminders that help you to communicate information.

numbered list

A list used to denote a ranking or sequence that must be followed to achieve a desired outcome.

page guides

Guides that appear only on the page on which they are created.

Preflight

The process of performing a quality check on a document before printing it.

process colors

Colors defined by combining different colors to produce a required shade.

rectangular text wrap

A type of text wrap that allows you to wrap text around the squared edges of a rectangular frame.

ruler

An on-screen measuring device used to measure the vertical and horizontal positions of page elements in a document.

rules

Lines that appear either above or below paragraphs and are used to separate the heading and the body text of a document.

shapes

A container representation that enables you to place text and graphics.

smart guides

Guides that enable you to align objects to other objects in the layout.

spot color

A color that can be printed by using a single premixed ink and not as a combination of the process colors.

spread

Facing or adjacent pages laid out for printing.

spread guides

Guides that appear across all pages of a multiple-page spread.

story

An uninterrupted body of text that flows in a text frame.

stroke

A line that bounds the outer perimeter of a graphic or text frame.

style

A collection of attributes that can be applied together as a single formatting option.

swatch

A stored color, gradient, or tint definition that can be applied to any element that requires color, gradient or tint to achieve conformity throughout projects.

table

A container used to organize text or graphics in a column and row format.

text frame

A frame used to include text in a document.

text overset

A feature that indicates that there is unseen text in a text frame. It occurs when the amount of text placed in a text frame or cell is more than the frame or cell can hold.

text threading

The act of designating one text frame to receive text that overflows the boundaries of another text frame.

text wrap

The collection of settings that allows text to flow around another object in various ways.

tints

Lighter variations of colors defined as swatches.

Transform panel

A panel that displays various geometrical information, such as the position, size, rotation, and shear of an object.

Type tool

A tool that enables you to add text to a frame and to select text as well.

user dictionary

A customized list of correctly spelled words that can be used to check the spelling of your document.

variable font

An OpenType font that supports customizable weight, width, slant, and other attributes.

workspace

An arrangement of window elements in a document.

Index

A

Align panel [95](#)
Application bar [3](#)
Autocorrect [120](#)
Auto-Fit [53](#)

B

Baseline Grid [44](#)
baseline grids [93](#)
bookmarks [153](#)
Bullets and Numbering dialog box [69](#)

C

captions [54](#)
Cell Options dialog box [137](#)
Cell Styles panel [138](#)
Character Styles panel [85](#)
color models [75](#)
Color panel [77](#)
Color Picker [78](#)
colors
 choosing [78](#)
 custom [77](#)
 mixing [81](#)
 process [75](#)
 spot [76](#)
 tints [80](#)
column rules [68](#)
commenting [123](#)
Control panel [3](#), [13](#), [42](#)
Convert Table to Text command [130](#)
Convert Text to Table command [130](#)
Customize Control Panel dialog box [13](#)

D

display performance [58](#)
Document Fonts folder [153](#)
document grids [93](#)
documents
 creating [37](#)
 preset settings for [38](#)
drop caps [43](#), [65](#)

E

Essentials workspace [11](#)
Eyedropper tool [76](#)

F

fills
 for tables [130](#), [137](#)
Find/Change dialog box [118](#)
frame unthreading [114](#)

G

gradients [81](#)
graphic design
 principles [31](#)
graphic frames [53](#)
grids [93](#)
guides
 overview [92](#)

I

images
 display resolution [58](#)
 editing original [54](#)

- file information for 56
- importing 44, 53
- importing, multiple files 47

indents 65

Info panel 56

Insert Table command 130

interface

- customizing 13
- elements of 3, 18

K

Keyboard Shortcuts dialog box 12

L

layers

- flattening 102
- working with 101

Layers panel 101

Links panel 56

lists

- bulleted 68, 69
- numbered 68, 69

M

Menu bar 3

Menu Customization dialog box 13

N

navigation controls 18

New Document dialog box 37

New PDF Export Preset dialog box 150

notes 123

Notes panel 123

O

objects

- aligning 95
- arranging 92
- grouping 52
- locking 52
- transforming 106, 107

Object Styles panel 85

OpenType fonts 67

output

- packaging 152
- PDF 150
- printing 145

P

packaging 152

page guides 92

Paragraph Styles panel 85

PDF

- export, for web 153
- for printer files 149
- presets 150

pixel dimensions and resolution 58

Place dialog box 44, 47

Place Gun 54

Polygon tool 52

preflight

- error checking 144
- fixing errors found in 144
- live 144

Preflight panel 144

Print dialog box 145

print settings 145

project planning 25

Q

Quick Apply 86

R

rulers 47

rules

- column 68
- overview 68

S

screen mode 4

shapes

- categories of 52

smart guides 92

Smart Text Reflow 47, 113

spelling

- dynamic spell check 121
- manual spell check 121
- spell check 121, 122

spread 38

spread guides 92

stacking order 92, 101

Start workspace 2

story 112, 113, 119

Story Editor 119

Stroke panel 75

strokes

- appearance 74

- formatting [75](#)
- for tables [130](#), [137](#)
- styles [85](#), [86](#)
- swatches [79](#), [81](#)
- Swatches panel [79](#)

T

- Table Options dialog box [130](#)
- Table panel [132](#)
- tables
 - components of [130](#)
 - formatting [130](#), [137](#), [138](#)
 - modifying [132](#)
 - ways to create [130](#)
- Table Styles panel [138](#)
- text
 - flowing [47](#), [113](#)
 - formatting, character [64](#)
 - formatting, paragraph [65](#)
 - formatting, table cells [138](#)
 - importing [44](#), [46](#)
 - importing, multiple files [47](#)
 - in columns [43](#)
 - replacing [118](#)
 - styles [85](#)
- Text Frame Options dialog box [43](#)
- text frames [42](#), [43](#), [47](#), [112](#), [114](#)
- text overset [112](#)
- text threading
 - adding frames [112](#)
 - deleting frames [114](#)
- text unthreading [114](#)
- text wrap
 - ignoring [43](#)
 - rectangular and contour [54](#)
- Text Wrap panel options [54](#)
- Tools panel
 - description of [3](#)
 - sections of [5](#)
- Touch workspace [4](#)
- Transform Again commands [107](#)
- Transform panel [106](#)
- transparency [102](#)
- Type tool [42](#)

U

- user dictionaries [122](#)

W

- workspaces
 - predefined [11](#)

Z

- zoom options [18](#)
- Zoom tool [18](#)

092023S rev 8.0
ISBN-13 978-1-4246-2236-8
ISBN-10 1-4246-2236-0

