What InDesign Can Do for You
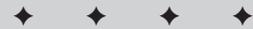
C H A P T E R

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In This Chapter

Learning what
InDesign can do

Discovering the
InDesign approaches
to layout

Understanding global
and local control

Identifying InDesign
terminology

✦   ✦   ✦   ✦

Although Adobe InDesign is a relatively new desktop-publishing program, its history actually spans more than 15 years; it succeeds the venerable Adobe PageMaker, the first popular desktop-publishing program. InDesign *is* an all-new program — make no mistake about that — but it draws on the experience and design of PageMaker, which Adobe Systems acquired in 1994 and significantly modified in the intervening years. As Adobe's entry into the professional, more-creative publishing space that has been dominated by QuarkXPress, the developers of InDesign also learned a lot of lessons from QuarkXPress, offering many comparable features in a way that fits the InDesign publishing workflow model.

Why does this history matter? Because chances are you already use PageMaker or, more likely, QuarkXPress and are switching to InDesign or adding InDesign to your software toolkit. You'll find a lot of familiar things in InDesign, but InDesign is a new product that borrows from PageMaker and other Adobe products, as well as from its chief rival, QuarkXPress. It also adds new components of its own. So draw upon your experience with PageMaker, QuarkXPress, or other Adobe software, but don't let that experience fool you into thinking you can run InDesign on autopilot. Instead, be sure to really learn InDesign's approaches.

Cross-Reference
If you're switching to InDesign from QuarkXPress or PageMaker, be sure to check out Appendix C or Appendix D. These appendixes will help you translate your QuarkXPress and PageMaker expertise into InDesign's frame of reference.
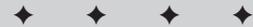
What makes InDesign special

The release of PageMaker in 1986 launched the desktop publishing revolution, and in the following years, PageMaker and its competitors added tons of cool features. It may be hard to imagine that there's anything new to add to this publishing toolkit.

Well, InDesign's creators have managed to add a few new features. Following are the significant additions to the desktop publishing toolkit, courtesy of InDesign (note that this list doesn't include enhanced versions of features found in competitors such as QuarkXPress and Ventura Publisher, or in PageMaker):

✦ **Multiline composer,** which lets InDesign adjust the spacing and hyphenation over several lines of text at once—rather than the typical one-line-in-isolation of other programs—to achieve the best possible spacing and hyphenation. (See Chapter 18.)

✦ **Optical margin alignment,** which actually moves some characters past the margin of your columns to create the optical illusion that all the characters line up. This works because some characters' shapes fool the eye into thinking they begin before or after where they really do, so although technically aligned, they appear not to be. Optical margin alignment fixes that. (See Chapter 18.)

✦ **Optical kerning**, which adjusts the spacing between characters based on their shapes, for the most natural look possible without resorting to hand-tuning their spacing. (See Chapter 18.)

✦ **A menu for inserting special characters,** so you no longer have to remember codes or use separate programs like the Mac's Key Caps or the Windows Character Map to add special symbols like bullets (•) and section indicators (§). Your word processor has likely had this feature for a few years, but this is a first in desktop publishing. (See Chapter 15.)

✦ **Glyph scaling,** which lets InDesign stretch or compress characters to make them fit better on a line. (A *glyph* is a character.) This works in addition to tracking and kerning, which adjust the spacing between characters to make them fit better on a line. (See Chapter 18.)

✦ **Custom strokes for characters,** which let you change the look of characters by making their outlines thicker or thinner. You can also give the part of the characters inside the outlines a different color, to create an outline effect. (Normally, the part inside the stroke is the same color as the stroke, so the reader sees a normal, solid character.) (See Chapter 18.)

✦ **EPS display,** so you can now see the detailed contents of an EPS file rather than rely on a poor-quality preview image or, worse, see an X or gray box in place of the image. (See Chapter 22.)

✦ **Illustrator and Photoshop file import,** so you can place these graphics files directly in your layout. (See Chapter 23.)

✦ **Multiple views of the document,** so you can have several windows open for the same document, letting you see different sections at the same time. (See Chapter 3.)

✦ **Custom drop-shadow creation,** so you can create exactly the kind of drop-shadow effect you want and not be stuck with a canned option. (See Chapter 11.)

So what can InDesign do for you? A lot. For years, layout designers had to choose between a free-form but manual approach to layout (PageMaker) and a structured but easily revised approach (QuarkXPress). Most chose the latter. With InDesign, you can choose both. That's important for both novice and experienced users, because it isn't a one-size-fits-all answer. Sometimes (for example, if your project is a one-time publication or an experimental effort), creating a layout from scratch — almost as if you were doing it by hand on paper — is the best approach. And sometimes using a highly formatted template that you can modify as needed is the best approach, because there's no need to reinvent the wheel for common documents.

InDesign can handle sophisticated tasks like magazine and newspaper page layout, but its simple approach to publishing also makes it a good choice for smaller projects like flyers and newsletters. InDesign is also a good choice for corporate publishing tasks such as proposals and annual reports. Plug-in software from other vendors adds extra capabilities; for example, Virginia Systems offers several plug-ins that make InDesign a good tool for books and academic papers.

Cross-Reference For more on plug-in software, see Chapter 36.

But that's not all. InDesign is not merely a merger of QuarkXPress and PageMaker — though it will seem that way to experienced users. It is designed from the ground up as an *electronic* publishing tool. That means documents can easily be sent to service bureaus and printing presses for direct output, saving you lots of time and money. It also means you can create documents for electronic distribution, particularly using the Adobe Acrobat Portable Document Format (PDF). These electronic files can include interactive features such as forms and sounds.

Cross-Reference See Part VI and Part VII for more in-depth coverage of output and interactive-document fundamentals.

This chapter details the wide range of uses and features of InDesign, points out the ways in which InDesign can be useful to you, and describes the basic metaphor on which the program is based. I also provide a comprehensive list of the terms — clearly and concisely defined — that I use throughout the book. So whether you're an expert or novice, read on and prepare yourself for a great InDesign adventure.

Discovering the InDesign Approach

Publishing programs, although similar in many ways, differ in their approach to the publishing task. One way to describe a program's approach to publishing is to talk about its *metaphor,* or the overall way that it handles publishing tasks. Some programs use a *free-form metaphor,* which means that the method used to assemble a document is based on assembling page elements as you would if they were placed on a pasteboard until ready for use (this is also called the *pasteboard metaphor,* although that's a less precise term because software using other metaphors can still include a pasteboard). Other programs approach page layout using a *frame-based metaphor,* in which frames (or boxes) hold both the page elements and the attributes that control the appearance of those elements. InDesign uses both the free-form metaphor and the frame-based metaphor.

The frame-based metaphor

Under a frame-based metaphor, you build pages by assembling a variety of frames that will contain your text and graphics. First, you set up the basic framework of the document — the page size and orientation, margins, number of columns, and so on. You then fill that framework with text, pictures, and lines.

Note These frames and lines need not be straight or square. With InDesign, you can create frames that are shaped by Bézier curves. (In the 1970s, French engineer Pierre Bézier created the mathematics that make these adjustable curves work.)

There are several reasons to use frames:

✦ **To create a template for documents like newsletters and magazines that use the same basic elements for many articles.** You create the frames and then add the text and graphics appropriate for each specific article — modifying, adding, and deleting frames as necessary for each article.

✦ **To get a sense of how you want your elements to be placed and sized before you start working with the actual elements.** This is similar to creating a pencil sketch on paper before doing a formal layout.

✦ **To ensure specific size and placement of elements up front — in this case, you're often working with a template or guidelines that limit size and placement of elements.** In many cases, you can copy an existing frame, because its size is one you're using in several locations of your layout. For structured or partly structured documents like newsletters and magazines, I find setting up my documents up front so elements are sized and placed correctly easier than resizing elements one at a time later.

Note Bear in mind that whether you start by creating frames in which you will later place graphics or text or you simply place the text and graphics directly on your page, you're using frames. In the case of direct placement of elements on the

page, InDesign creates a frame automatically for each element. The difference is that the frame InDesign creates is based on the amount of text or the size of the graphic, rather than on your specific specifications. Of course, in either case, you can modify the frames and the elements within them.

The free-form metaphor

Under a free-form (pasteboard) metaphor, you draw the pages' content as if you're working on paper. Depending on how long you've been in this business, you may well remember having paste-up boards with strips of type, camera-ready line drawings, halftone pictures strewn about, sticking to pasteboard thanks to the wax on their backs. You would then assemble all those pieces until you got the combination that looked right to you. The free-form metaphor encourages an experimental approach, which is particularly well suited to one-of-a-kind documents such as ads, brochures, annual reports, and marketing materials.

Note   In a frame-based approach, you can certainly experiment by using the frames as placeholders for actual text and graphics. But visual thinkers like to work with actual objects, and that's why the free-form metaphor works much better for them. With InDesign, you pick the metaphor that works for your style, your current situation, and your mood. After all, both approaches can lead to the same design.

Understanding Global and Local Control

The power of desktop publishing in general, and InDesign in particular, is that it lets you automate time-consuming layout and typesetting tasks while letting you customize each step of the process according to your needs. This duality of structure and flexibility—implemented via the dual use of the frame-based and free-form layout metaphors—carries over to all operations, from typography to color: You can use *global* controls to establish general settings for layout elements and then use *local* controls to modify those elements to meet specific publishing requirements. The key to using global and local tools effectively is to know when each is appropriate.

Global tools include

✦ General preferences and application preferences (see Chapter 3)

✦ Master pages (see Chapter 7)

✦ Style sheets (see Chapter 20)

✦ Sections of page numbers (see Chapter 5)

✦ Color definitions (see Chapter 8)

✦ Hyphenation and justification (see Chapter 18)

✦ Libraries (see Chapter 7)

Note Styles and master pages are the two main global settings that you can expect to override locally throughout a document. You shouldn't be surprised to make such changes often because, although the layout and typographic functions that style sheets and master pages automate are the fundamental components of any document's look, they don't always work for all a publication's specific content.

Local tools include

✦ Frame tools (see Chapter 10, Chapter 11, Chapter 12, Chapter 21, and Chapter 25)

✦ Character and paragraph tools (see Chapter 17, Chapter 18, Chapter 19, and Chapter 20)

✦ Graphics tools (see Part V)

Knowing which tools to use

In many cases, it's obvious which tool to use. If, for example, you maintain certain layout standards throughout a document, then using master pages is the obvious way to keep your work in order. Using styles is the best solution if you want to apply standard character and paragraph formatting throughout a document. When you work with special-case documents, such as a single-page display ad, it doesn't make much sense to spend time designing master pages and styles — it's easier just to format one-of-a-kind elements on the fly.

In other cases, deciding which tool is appropriate is more difficult. For example, you can create *drop caps* (large initial letters set into a paragraph of type, like the drop cap that starts each chapter in this book) as a character option in the Character pane, or you can create a *character style* (formatting that you can apply to any selected text, ensuring the same formatting is applied each time) that contains the drop-cap settings and apply that style to the drop cap. Which method you choose will depend on the complexity of your document and how often you'll need to perform the action. The more often you find yourself doing something, the more often you should use a global tool (like character styles).

Fortunately, you don't have to decide between global and local tools right away while designing a document. You can always create styles from existing formatting later or add elements to a master page if you find you need them to appear on every page.

Specifying measurement values

Another situation in which you can choose between local or global controls is specifying measurement values. Regardless of the default measurement unit you set (and that appears in all dialog boxes, panes, and palettes), you can use any unit when entering measurements in an InDesign dialog box. If, for example, the default measurement is picas, but you're accustomed to working with inches, go ahead and enter measurements in inches.

InDesign Vocabulary 101

InDesign comes with its own terminology, much of it adopted from other Adobe products. The general ones (not covered elsewhere in this book) include the following:

✦ **Link:** The connection that InDesign makes to an imported file; the link contains the file's location, last modification date, and last modification time. A link can reference any image or text file that you have imported into a layout. InDesign can notify you when a source text or graphics file has changed, so you can choose whether to update the version in your layout. (A *hyperlink,* often also abbreviated to *link* in casual conversation, connects elements in a Web page to other Web pages.)

✦ **Package:** The collecting of all files needed to deliver a layout for printing or Web posting.

✦ **PDF:** The Adobe Portable Document Format is the standard for electronic documents. No matter what kind of computer it is viewed on (Windows, Macintosh, or Unix), a PDF document retains high fidelity to the original in typography, graphics representation, and layout. InDesign can both place PDF files as if they were graphics and export its own pages to PDF format.

✦ **Place:** To import a picture or text file.

✦ **Plug-in:** A piece of software that loads into InDesign and becomes part of InDesign, to add more capabilities.

Not too long ago, only a few publishing professionals knew — or cared about — what the words *pica, kerning, crop,* or *color model* meant. Today, these words are becoming commonplace, because almost everyone who wants to produce a nice-looking report, a simple newsletter, or a magazine encounters these terms in the menus and manuals of their layout programs. Occasionally, the terms are used incorrectly or are replaced with general terms to make nonprofessional users feel less threatened, but that substitution ends up confusing professional printers, people who work in service bureaus, and Internet service providers. For a primer on publishing terms, see Chapter 39, Chapter 40, and Chapter 42.

InDesign accepts any of the following codes for measurement units:

✦ *x*″, *x*i, *x* in, or *x* inch (for inches)

✦ *x*p (for picas)

✦ *x*pt or 0p*x* (for points)

✦ *x*c (for ciceros)

✦ *x*cm (for centimeters)

✦ *x*mm (for millimeters)

Tip   Note that the *x* above indicates where you specify the value, such as 1i for 1 inch). It doesn't matter whether you put a space between the value and the code: *1inch* and *1 inch* are the same as far as InDesign is concerned.
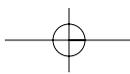
Tip   You can enter fractional picas in two ways: in decimal format (as in *8.5p*) and in picas and points (as in *8p6*). Either of these settings results in a measurement of 8½ picas (there are 12 points in a pica).

Summary

InDesign offers a strong set of features for professional publishers working on brochures, magazines, advertisements, and similar publications. Although it lacks specialized tools for database publishing (such as for catalogs), it offers many unique features such as a multilane composer, glyph scaling, and customer character strokes.

InDesign's use of both the free-form and structured layout metaphors makes it very flexible, letting you pick the layout style that works best for you and for your document's specific needs.

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