Chapter 1

Finding Out How InDesign Works

In This Chapter

- Understanding what InDesign can do for you
- Finding out how InDesign works
- Defining InDesign terms

Page layout programs have been around for the past couple of decades, so you'd think that software in this category is mature and past its innovative prime. But that's not true: Adobe InDesign has revitalized the category with a raft of powerful, unique capabilities. Yet Adobe InDesign, the new kid on the block, actually has a history that goes back way before its appearance on the scene. InDesign is the modern-day successor to PageMaker. PageMaker was an early — and popular — page layout program created by a no-longer-existing company by the name of Aldus, which was acquired by Adobe in 1994. To its credit, InDesign is also taking over market share from a market-leading competing product: QuarkXPress.

Why mention this history? Because if you're reading this, there's a good chance that you are already using a page layout program — perhaps QuarkXPress or PageMaker. If so, you'll find some features of InDesign to be familiar, others to be fairly easy to assimilate, and still others to be just about as confusing as can be. If you are new to page layout programs and are taking your first steps with InDesign, that's fine, too. You can get up and going with the program after a very short time.

If you're well-versed in how to use previous versions of InDesign, you already know the basics. Feel free to skip this chapter and move right ahead. If not, settle in for a nice conversation about how to get started using a very comprehensive page layout program.

Lots of Capabilities

Before InDesign, layout designers chose from two predominant software programs. PageMaker offered an unstructured approach to layout in which the designer had lots of flexibility but needed to manually position text and

graphics on the print (or, later, online) page. A slightly later addition to the desktop publishing scene, QuarkXPress, offered structural elements to help construct the page while still making it easy to revise layouts. InDesign, which tries — successfully, for the most part — to be more things to more people, lets you choose from both approaches. This flexibility means that you can create a layout from scratch, or you can use a formatted template that helps you position text and graphics into a predetermined spot in the layout, with prearranged look-and-feel specifications. And if you want to deviate from the formatted template, InDesign lets you do that as well.

What kinds of layouts can InDesign handle? Pages for magazines, newspapers, marketing brochures, and ads to start with. InDesign is also an excellent choice for more structured documents, such as corporate reports, newsletters, white papers, and annual reports. The program's intuitive approach to publishing also makes it a good choice for smaller projects, such as newsletters and informational flyers. After you get the hang of it, you'll find InDesign simple to use. But don't forget that it is full-featured enough to handle the most complex page-layout tasks, everything from a magazine ad to an annual report. Figures 1-1 through 1-3 show a few examples of InDesign's range.

Finding Out What InDesign Can Do

Seeing as how InDesign is a leading, if not *the* leading, page layout program, it makes sense that it is a whiz at helping you lay out pages quickly and easily. 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 multiline composer, glyph scaling, and customer character strokes, some of which we talk about later in the chapter.

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

Among InDesign's most useful and innovative capabilities are the following:

- Styles let you perform complex formatting quickly and easily. Use nested styles to handle tricky text formatting, such as a drop cap with its own character style nested inside a paragraph with its own style, or to make sure all sidebar frames have the same background.
- InDesign's support for sophisticated OpenType fonts (in addition to more standard PostScript and TrueType fonts) and its ability to highlight missing fonts in a document let you handle font issues easily.

- The multiline composer adjusts 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.

Figure 1-1: Get your message out with posters created in InDesign.

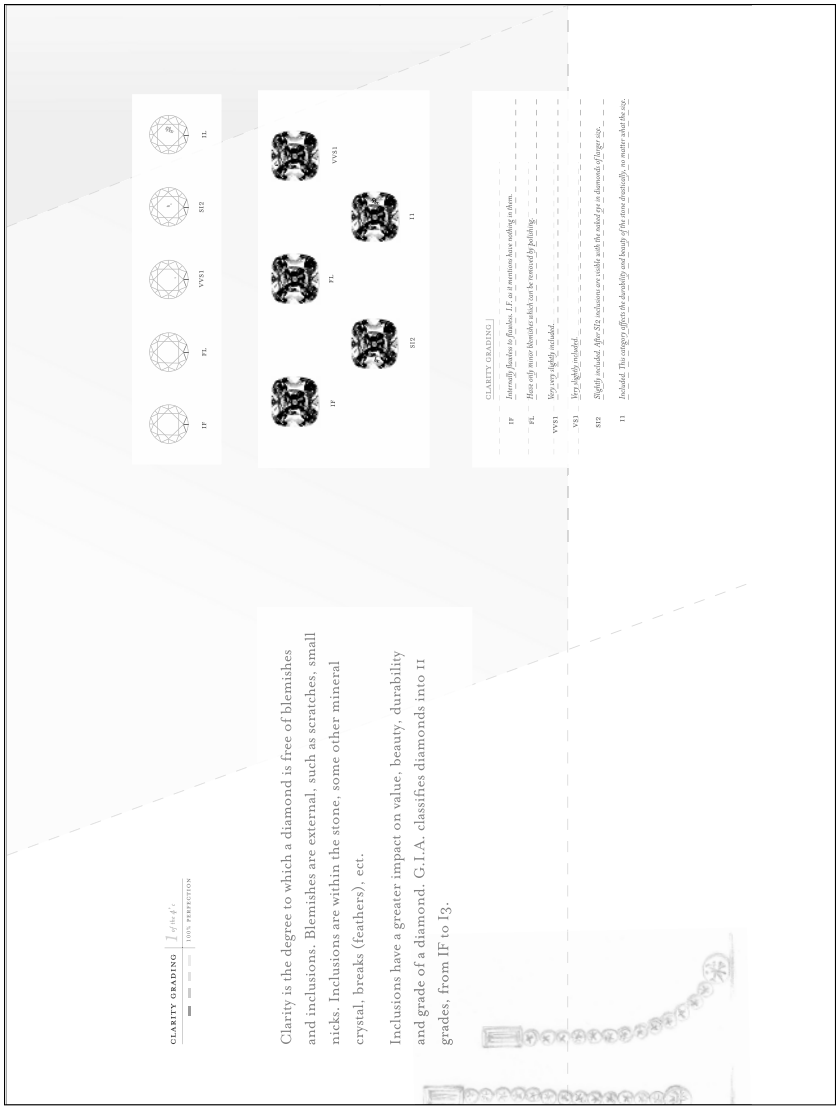

Figure 1-2: InDesign is great for producing product brochures, like this brochure about diamonds.

- Custom strokes for characters let you change the look of characters by making their outlines (*strokes*) thicker or thinner. You can also give the part of the characters inside the stroke 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.)
- Illustrator and Photoshop file import lets you place these graphics files directly into your layout.

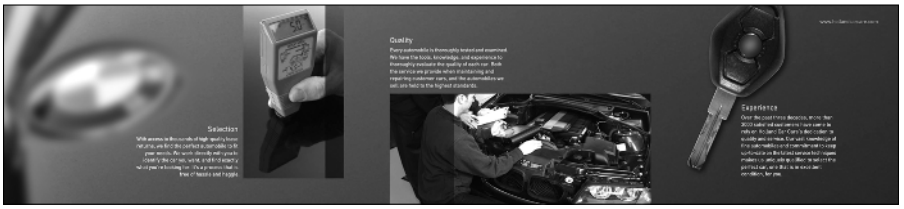

Figure 1-3: InDesign lets you design layouts with abnormal page sizes, like this brochure.

- Multiple views of the document let you see different sections at the same time.
- Transparency can make objects fade for ghost-like visuals or to create special effects as the objects overlap.
- InDesign offers automated spell checking and text correction similar to Microsoft Word's noninvasive correction tools.
- Object styles let you apply a range of attributes (such as fill and stroke) to an object and reuse those same settings on other objects.
- Follow-me anchored objects let you keep items such as figures and sidebars with text as it flows throughout a document.

Discovering the InDesign Approach

Publishing programs have some similarities and some differences in their various approaches 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 craft 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, which is an imprecise term because software that uses other metaphors can still include a pasteboard. PageMaker is the best-known example of the free-form approach.

Other programs approach page layout by 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. QuarkXPress is the best-known example of the frame-based approach.

InDesign is the best of both worlds because it incorporates both the free-form and the frame-based metaphors.

The frame-based metaphor

When you work with 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.

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.)

Why would you want to use frames? Publishers find several reasons why frames come in handy:

- **To create a template for documents, such as newsletters and magazines, that use the same basic layout elements across 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 sketching a rough layout on paper with a pen or pencil before doing a formal layout with InDesign.
- **To set up specific size and placement of elements up front.** You often work with a template or with guidelines that limit the size and placement of elements. In many cases, you can copy an existing frame because its size is the same as what you use in several locations of your layout. For structured or partly structured documents, such as newsletters and magazines, we find it easier to set up documents up front so that elements are sized and placed correctly; the less favorable alternative is resizing elements one at a time later on.

Whether you start by creating frames to hold graphics or text or you simply place the text and graphics directly on your page, you're using frames. When you directly place elements on the page, InDesign creates a frame automatically for each element. The frame InDesign creates is based on the amount of text or the size of the graphic, rather than on your specific frame specifications. Of course, in either case, you can modify the frames and the elements within them.

The free-form metaphor

Working under a free-form (pasteboard) metaphor, you draw a page's content as if you're working on paper. If you've been in the publishing business for a

while, you might once have used wax to stick strips of type, camera-ready line drawings, and halftone pictures to a pasteboard. You would then assemble and reassemble all those pieces until you got the combination that looked right to you. The free-form metaphor encourages a try-as-you-go, experimental layout approach, which is particularly well suited to one-of-a-kind documents such as ads, brochures, annual reports, and marketing materials.

If you use a frame-based approach to page layout, you can experiment with using the frames as placeholders for actual text and graphics. Visual thinkers like to work with actual objects, which is 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 great 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, at the same time, 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 4)
- Master pages and libraries (see Chapter 8)
- Character and paragraph styles (see Chapters 16 and 17)
- Object styles (see Chapter 13)
- Sections and page numbers (see Chapter 6)
- Color definitions (see Chapter 10)
- Hyphenation and justification (see Chapter 17)

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 styles and master pages automate are the fundamental components of any document's look, they don't always work for a publication's entire specific content.

Local tools include:

- Frame tools (see Part III, as well as Chapters 18 and 20)
- Character and paragraph tools (see Chapters 16 and 17)
- Graphics tools (see Part V)

Choosing the right tools for the job

Depending on what you're trying to do with InDesign at any given moment, you may or may not know right away which tool to use. If, for example, you maintain fairly precise layout standards throughout a document, then using master pages is the 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 one-of-a-kind documents, such as the poster shown in Figure 1-1, it doesn't make much sense to spend time designing master pages and styles — it's easier just to format elements as you create them.

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 paragraph option in the Paragraph pane, or you can create a *paragraph style* (formatting that you can apply repeatedly to whole paragraphs, ensuring that the same formatting is applied each time) that contains the drop-cap settings, and then apply that style to the paragraph containing the drop cap. Which method you choose depends on the complexity of your document and how often you need to perform the action. The more often you find yourself taking a set of steps, the more often you should use a global tool (like character and paragraph styles) to accomplish the task.

Fortunately, you don't need to choose between global and local tools while you're in the middle of designing a document. You can always create styles from existing formatting later. You can also add elements to a master page if you start to notice that 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 (that is, the measurement unit that appears in all dialog boxes, panes, and palettes), you can use any unit when entering measurements in an InDesign dialog box. For example, if the default measurement is picas, but you're new to publishing and are more comfortable with working in inches, go ahead and enter measurements in inches.

InDesign accepts any of the following codes for measurement units. Note that the *x* in the items listed below indicates where you specify the value, such as **2i** for 2 inches. It doesn't matter whether you put a space between the value and the code: Typing **2inch** and **2 inch** are the same as far as InDesign is concerned:

- *x*i or *x* inch or *x*" (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)

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).

Basic InDesign Vocabulary

Not too long ago, only a few publishing professionals knew — or cared about — what the words *pica, kerning, crop,* and *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 non-professional users feel less threatened, but that substitution ends up confusing professional printers, people who work in service bureaus, and Internet service providers. Throughout this book, we define other publishing terms as we go.

Like all great human endeavors, InDesign comes with its own terminology, much of it adopted from other Adobe products. Some general terms to know include the following:

- **Frame:** The container for an object. A frame can hold text, a graphic, or a color fill.
- **Link:** The connection to a file that you import, or *place* (defined below), into an InDesign document. The link contains the file's location, and its last modification date and 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.

- **Package:** The collection of all files needed to deliver a layout for printing or Web posting.
- **PDF:** The Adobe Portable Document Format, which has become the standard for sharing electronic documents. No matter what kind of computer it is viewed on (Windows, Macintosh, Palm, or Unix), a PDF document displays the original document's typography, graphics representation, and layout. With InDesign, you can place PDF files as if they were graphics, and you can also export its InDesign pages to PDF format.
- **Place:** To import a picture or text file.
- **Plug-in:** A piece of software that loads into, and becomes part of, InDesign to add capabilities to the program.
- **Stroke:** The outline of an object (whether a graphic, line, or individual text characters) or frame.
- **Thread:** The connections between text frames that let a story flow from one frame to another.