Chapter 1

Understanding InDesign Ingredients

In This Chapter

▶ Getting acquainted with the InDesign approach

▶ Figuring out global versus local control

▶ Getting up to speed on the InDesign vocabulary

▶ Exploring the document window

▶ Surveying the top tools

▶ Becoming familiar with tools and panels

▶ Discovering what's in the menus

*S*tarting to use a new software application is not unlike meeting a new friend for the first time. You take a long look at the person, maybe ask a few questions, and begin the process of becoming acquainted. (If you're not new to InDesign but are new to the CS4 version, it's like seeing a friend you haven't seen in a while — you observe any changes and catch up on what's happened in the meantime.)

Just as it's worthwhile to find out the likes and dislikes of a new friend, it's also worth your time to wrap your head around InDesign's unique style and approaches. When you do so, you'll find it much easier to start using InDesign to get work done.

This chapter explains where to look in InDesign for the features and capabilities you need to master. (For a quick look at what's new to version CS4, check out Chapter 25.) I introduce you to the process that InDesign assumes you use when laying out documents, explain some of the terms you'll encounter throughout the book, describe the unique interface elements in the document window, survey the most commonly used tools, and explain how InDesign packages much of its functionality through an interface element called a *panel*.

InDesign CS4 has an annoying new feature of hiding menu options from you. The goal is to be less intimidating, but it also means if you don't know what InDesign can do, you won't find out by looking at the menus. Fortunately, you can tell InDesign to show you all the menus all the time, so no features are hidden. Here's how: Choose Window➪Workspace➪Show Full Menus. This book assumes that you've turned the menus all on.

nderstanding 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.

What does that mean in practice? That you can use *global* controls to establish general settings for layout elements, and then use *local* controls to modify those elements to meet specific 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 2)
- ✔ Master pages and libraries (see Chapter 5)
- ✔ Character and paragraph styles (see Chapter 13)
- ✔ Table and cell styles (see Chapter 19)
- ✔ Object styles (see Chapter 9)
- ✔ Sections and page numbers (see Chapter 4)
- ✔ Color definitions (see Chapter 6)

Keep your bearings straight

A powerful but confusing capability in InDesign is something called a *control point*. InDesign lets you work with objects from nine different reference points — any of the four corners, the middle of any of the four sides, or the center — such as when positioning the object precisely or rotating the object. You choose the active reference point, or *control point*, in the Control panel or Transform panel, using the grid of nine points arranged in a square.

By default, InDesign uses the central reference point as the control point, which is great for rotating an object, but can lead to confusion when you enter in the X and Y coordinates to place it precisely. That's because most people use the upper-left corner of an object when specifying its coordinates, not the center of the object. Be sure to change the control point to the upper-left reference point whenever entering X and Y coordinates in the Control or Transform panels.

How do you change the control point? That's easy: Just click the desired reference point in that preview grid. The control point will be black, whereas the other reference points will be white.

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 immediately know which tool to use. If, for example, you maintain fairly precise layout standards throughout a document, 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, on the other hand, designing master pages and styles doesn't make much sense — 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, such as the drop cap that starts each chapter in this book) as a character option in the Character panel, or you can create a *paragraph style* (formatting that you can apply 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 local 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 and panels), 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 working in inches, go ahead and enter measurements in inches.

InDesign accepts any of the following codes for measurement units. (Chapter 2 explains how to change the default measurements.) Note that the *x* in the following items 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 typing **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, a European newspaper measurement
- ✔ *x*ag (for agates, an American newspaper measurement)
- ✔ *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. (A pica contains 12 points.)

What to do when you make a mistake

InDesign is a very forgiving program. If you make a mistake, change your mind, or work yourself into a complete mess, you don't have to remain in your predicament or save your work. InDesign offers several escape routes. You can

- ✔ **Undo your last action by choosing Edit➪Undo (⌘+Z or Ctrl+Z).** (You can't undo some actions, particularly actions such as scrolling that don't affect any items or the underlying document structure.) You can undo multiple actions in the reverse order in which they were done by repeatedly choosing Edit➪Undo (⌘+Z or Ctrl+Z); each time you undo, the previous action is undone.

- ✔ **Redo an action you've undone by choosing Edit➪Redo (Shift+⌘+Z or Ctrl+Shift+Z).** Alternatively, choosing Undo and Redo is a handy way of seeing a before/after view of a particular change. As with undo, you can redo multiple undone actions in the reverse of the order in which they were undone.

Mastering Basic InDesign Vocabulary

All industries have their jargon to describe unique approaches, tools, attributes, and specifications. Publishing is no different. Its vocabulary includes *pica, kerning, crop,* and *color model.* But because programs like InDesign bring a once-specialized capability to the masses, the terms are sometimes used incorrectly. Sometimes, they're 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. Throughout this book, I define other publishing terms as they come up.

In addition to using publishing-industry vocabulary, InDesign comes with its own specific terminology, much of it adopted from other Adobe products. Terms to know include the following:
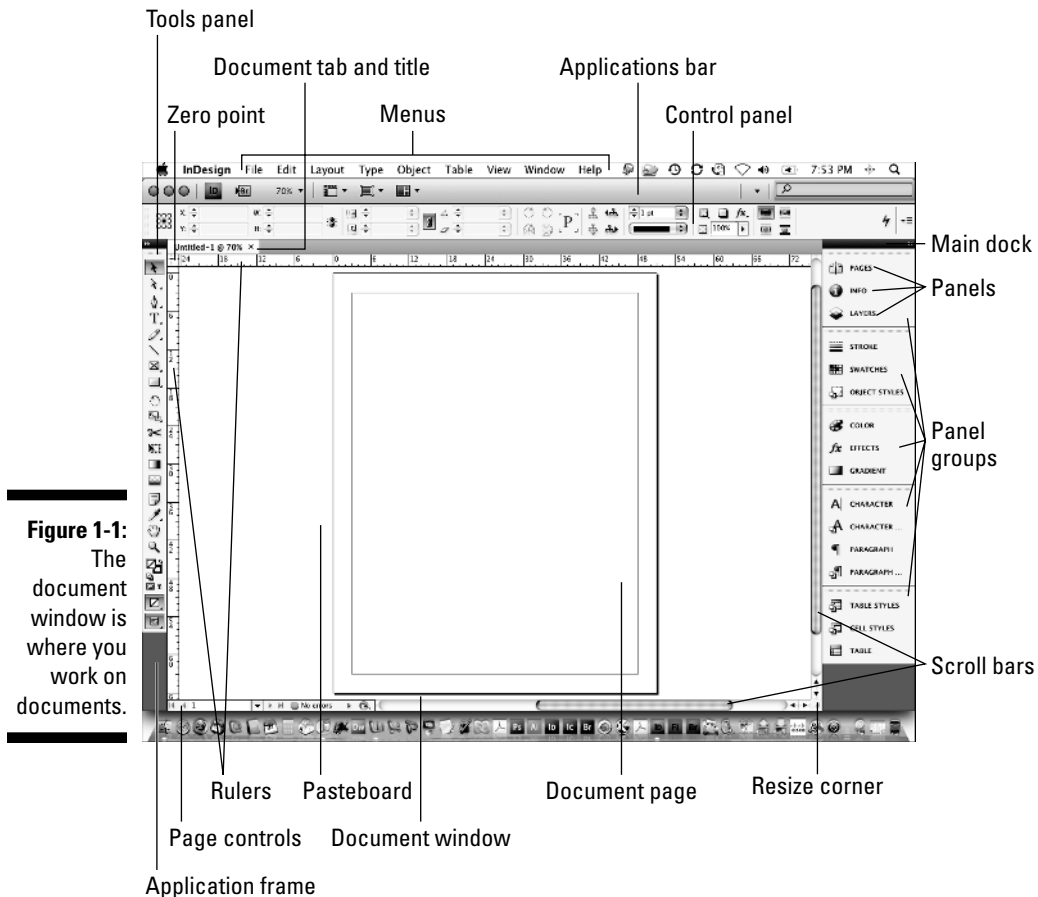
- ✔ **Frame:** The container for an object. A frame can hold text, a graphic, or a color fill.

- ✔ **Link:** The connection to a graphics or text file that you import, or *place,* into an InDesign document. The link contains the file's location and its last modification date and time. A link can reference any graphics or text file that you've imported into a layout. InDesign can notify you when a source text or graphics file has changed so that you can choose whether to update the version in your layout.

- ✔ **Package:** The collection of all files needed to deliver a layout for printing.

- ✔ **PDF:** The Adobe Portable Document Format, which has become the standard for sharing electronic documents. No matter what kind of computer it's 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.

- ✔ **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.

Discovering the Document Window

In InDesign, you spend lots of time working in document windows — the "containers" for your documents. Each document, regardless of its size, is contained within its own document window.

The best way to get familiar with the InDesign document window is by opening a blank document. Simply choosing File⇨New⇨Document (⌘+N or Ctrl+N) and clicking OK opens a new document window. Don't worry about the settings for now — just explore.

Figure 1-1 shows all the standard elements of a new document window. I won't bore you by covering interface elements that are standard to all programs. Instead, the rest of this section focuses on InDesign-specific elements.

Figure 1-1:
The document window is where you work on documents.

Tools panel

Document tab and title

Zero point

Menus

Applications bar

Control panel

Main dock

Panels

Panel groups

Scroll bars

Rulers

Pasteboard

Document page

Resize corner

Page controls

Document window

Application frame

TECHNICAL STUFF

The Version Cue pop-up menu lets you see the current status of a document in a shared workgroup setup. You can ignore this expert feature. The new Preflight pop-up menu helps deal with any issues that can affect printing, as Chapter 23 explains. And the new Search menu lets you look for files on your computer and in Adobe Bridge.

Rulers

Document windows display a horizontal ruler across the top and a vertical ruler down the left side. As shown in Figure 1-1, the horizontal ruler measures from the top-left corner of the page across the entire spread, and the vertical ruler measures from the top to the bottom of the current page. These rulers are handy for judging the size and placement of objects on a page. Even experienced designers often use the rulers while they experiment with a design.

Both rulers display increments in picas unless you change the measurement system for each ruler in the Units & Increments pane of the Preferences dialog box. Choose InDesign⇨Preferences⇨Units & Increments (⌘+K) or Edit⇨Preferences⇨Units & Increments (Ctrl+K) to open the Preferences dialog box. Your choices include inches, picas, points, decimal inches, ciceros, agates, millimeters, and centimeters.

TIP

If you change the ruler measurement system when no documents are open, the rulers in all new documents will use the measurement system you selected. If a document is open when you make the change, the rulers are changed only in that document.

TECHNICAL STUFF

You can also create your own measurement system by choosing Custom. Most people should ignore this option, but sometimes it can make sense, such as setting the ruler to match the line spacing, so that you can measure number of lines in your ruler.

If your computer has a small monitor and the rulers start to get in your way, you can hide them by choosing View⇨Hide Rulers (⌘+R or Ctrl+R).

Zero point

The point where the rulers intersect in the upper-left corner of the page is called the *zero point*. (Some people call it the *ruler origin*.) The zero point is the starting place for all horizontal and vertical measurements.

If you need to place items in relation to another spot on the page (for example, from the center of a spread rather than from the left-hand page), you can move the zero point by clicking and dragging it to a new location. Notice that

the X: and Y: values in the Control panel update as you drag the zero point so that you can place it precisely.

If you change the zero point, it changes for all pages or spreads in the document. You can reset the zero point to the upper-left corner of the left-most page by double-clicking the intersection of the rulers in the upper-left corner.

If you move the zero point, all the objects on the page display new X: and Y: values even though they haven't actually moved. Objects above or to the left of the zero point will show negative X: and Y: values, and the X: and Y: values of other objects will not relate to their actual position on the page or spread.

You can lock the zero point, making it more difficult to accidentally change it. Control+click or right-click the ruler origin and choose Lock Zero Point from the menu that appears. (The Unlock Zero Point command is right there as well, so you can just as easily unlock it.) Locking the zero point is a good idea because it will remind anyone working on your document that you prefer that they not fiddle with the zero point.

Pasteboard

The white area that surrounds the page is called the *pasteboard.* It's a work-space for temporarily storing objects. The pasteboard above and below each page or spread is an inch deep. The pasteboard at both left and right of a page or spread is just as wide as the page. For example, a spread composed of two 8-inch-wide pages has 8 inches of pasteboard to the left and 8 inches of pasteboard to the right, plus 1 inch of pasteboard above and 1 inch below.

You can make the height of the pasteboard above and below pages something other than the default of 1 inch. To do so, open the Guides & Pasteboard pane of the Preferences dialog box and choose a new value for the Minimum

With the application frame, Mac users can now put all the InDesign elements in their own container so that they *don't* float freely and other applications don't peek through. You show the application frame by choosing Window➪Application Frame — doing so makes InDesign for Mac behave like InDesign for Windows. (By default, the application frame is turned *off* in InDesign for Mac.)

Conversely, Windows users can choose Window➪Application Frame to *hide* the application frame so that InDesign for Windows looks like InDesign for Mac. (By default, the application frame is turned *on* in InDesign for Windows.)

The Application Frame menu command is a *toggle,* hiding the application frame if it's visible and showing it if it's hidden. You see a check mark next to the menu option if the application frame is visible. (InDesign uses the same toggling indicator in other menus.)

Above the Control panel is the new application bar, which offers easy access to other Adobe applications, such as Bridge, and access to controls over various view options. It appears by default if the application frame is enabled. When the application frame is hidden, you can show or hide the application bar by choosing Window➪Application Bar.

The application bar has several handy elements. From left to right:

✔ The first element is the set of quick-access buttons to Bridge and other Adobe software.

✔ The second element is the Zoom Level field and pop-up menu, which replaces the Zoom pop-up menu that used to be at the bottom of the document window.

✔ The third element is the View Options pop-up menu, which lets you hide and show frames boundaries, hidden characters, grids, and other such visual aids from one handy location. These options previously

Pages and guides

Pages, which you can see on-screen surrounded by black outlines, reflect the page size you set up in the New Document dialog box (File➪New➪Document [⌘+N or Ctrl+N]). If in your document window it looks like two or more pages are touching, you're looking at a *spread.*

InDesign uses nonprinting guides, lines that show you the position of margins and that help you position objects on the page. *Margins* are the spaces at the outside of the page, whereas *columns* are vertical spaces where text is supposed to go by default. Magenta lines across the top and bottom of each page show the document's top and bottom margins. Violet lines show left and right columns (for single-page documents) or inside and outside columns (for spreads).

InDesign CS4 introduces a new set of guides, called *smart guides,* covered in Chapter 10.

You can change the location of margin and column guides by choosing Layout➪Margins and Columns. You can create additional guides — such as to help you visually align objects — by holding down your mouse button on the horizontal or vertical ruler and then dragging a guide into the position you want.

Page controls

If you feel like flipping through pages of the document you're creating, InDesign makes it easy with page-turning buttons and the Page field and pop-up menu. Controls for entering prefixes for the page numbers of sections, and for indicating absolute page numbers in a document that contains multiple sections, are also handy. (An *absolute page number* indicates a page's position in the document, such as +1 for the first page, +2 for the second page, and so on.)

  ↳ You can also use the Pages panel to navigate your document, as Chapter
    4 explains.

pening Multiple Document Windows

If you like to work on more than one project at once, you've come to the right
program. InDesign lets you open several documents at once. It also lets you
open multiple windows simultaneously for individual documents. A large
monitor (or having multiple monitors connected) makes this multiwindow
feature even more useful. By opening multiple windows, you can

  ↳ **Display two (or more) different pages or spreads at once.** You still have
    to work on the documents one at a time, but no navigation is required —
    you have only to click within the appropriate window.

  ↳ **Display multiple magnifications of the same page.** For example, you
    can work on a detail at high magnification in one window and display the
    entire page — and see the results of your detail work — at actual size in
    another window.

  ↳ **Display a master page in one window and a document page based
    on that master page in another window.** When you change the master
    page, the change is reflected in the window in which the associated
    document page is displayed.

Document windows are now by default accessed through a set of tabs below
the Control panel, rather than as a series of cascaded windows as in previous
versions of InDesign.

When multiple windows are open, you activate a window by clicking on a win-
dow's title tab or anywhere within its window. Also, the names of all open docu-
ments are displayed at the bottom of the Window menu. Choosing a document

Windows option (single-window icon) in the Arrange Documents pop-up menu in the application bar.

TIP

If you don't like the tabbed approach to windows and instead want to use the old-style approach of stacked windows, you can. Just choose Window⇨Arrange⇨Float All in Windows. You can then move the individual windows around the screen as desired; if they get too messy, choose Windows⇨Arrange⇨Cascade to tell InDesign to make them all neat and tidy in a cascaded stack. If you want to go back to tabbed windows, choose Window⇨Arrange⇨Consolidate All Windows.

TIP

To close all windows for the currently displayed document, press Shift+⌘+W or Ctrl+Shift+W. To close all windows for all open documents, press Option+Shift+⌘+W or Ctrl+Alt+Shift+W.

Not only do you get separate document windows for each open document, you can also create multiple windows for an individual document so that you can see different parts of it at the same time. To open a new window for the active document, choose Window⇨Arrange⇨New Window (or use the New Window option in the new Arrange Documents pop-up menu in the application bar). The new window is displayed in its own tab or window, depending on whether you've enabled Open Documents as Tabs in the Interface pane of the Preferences dialog box (InDesign⇨Preferences⇨Interface [⌘+K] or Edit⇨Preferences⇨Interface [Ctrl+K]).

REMEMBER

You can tell that a document window shows a different view of an existing document by looking at the name of the document in the window's title. At the end of the document name will be a colon (:) followed by a number. Newsletter.indd:1 would be the document's first window, Newsletter.indd:2 would be its second window, and so on.

Tooling around the Tools Panel

You can move the InDesign Tools panel — the control center for 32 of InDesign's 33 tools, as well as for 13 additional functions — by clicking and dragging it into position. The Tools panel usually appears to the left of a document (see Figure 1-2).

REMEMBER

The one tool not directly accessible from the Tools panel is the Marker tool. But you can switch to it from the Eyedropper tool by holding Option or Alt. (Chapter 6 explains its use.)

TIP

To discover each tool's "official" name, hover the mouse pointer over a tool for a few seconds, and a Tool Tip will appear, telling you the name of that tool. If the Tool Tips don't display, make sure that the Tool Tips pop-up menu is set to Normal or Fast in the Interface pane of the Preferences dialog box (choose InDesign⇨Preferences⇨Interface [⌘+K] or Edit⇨Preferences⇨Interface [Ctrl+K]).

InDesign gives you one — and only one — tool for each specific job. The Tools panel includes tools for creating and manipulating the objects that make up your designs. The tools in the Tools panel are similar to those in other Adobe products (such as Photoshop, Illustrator, and Dreamweaver). I cover what each tool does in the following sections.

The small arrow in the lower-right corner of some tools is a pop-out menu indicator. A tool that displays this arrow is hiding one or more similar tools. To access these "hidden" tools, click and hold a tool that has the pop-out menu indicator, as shown in Figure 1-2. When the pop-out displays, click one of the new tools.

You can now also Control+click or right-click a tool to see the "hidden" tools.

You don't need to worry about all the tools, so I highlight just those that you'll need to know to start using InDesign. You'll likely come across the others as you work on specific tasks, so I cover those in the chapters that introduce those functions.
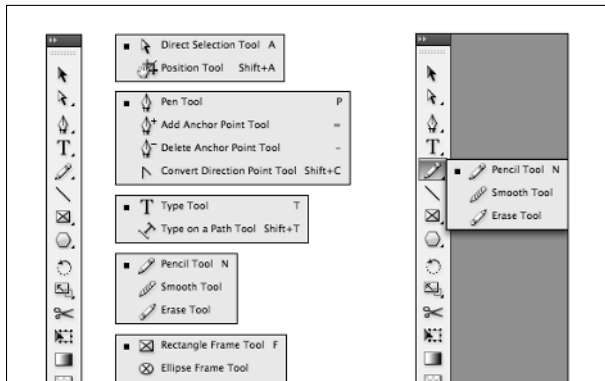
Figure 1-2: The InDesign Tools panel (left) and its pop-out tools

Using the Selection tools

To work with objects, you have to select them. InDesign provides three tools to do that, letting you select different aspects of objects.

Selection tool

The Selection tool is perhaps the most-used tool in InDesign. With the Selection tool, you can select objects on the page and move or resize them. You may want to think of this tool as the Mover tool because it's the only tool that lets you drag objects around on-screen.

After you've selected the Selection tool, here's how it works:

- ✔ **To select any object on a document page,** click it. If you can't seem to select it, the object might be placed by a master page (a preformatted page used to format pages automatically), or the object might be behind another object.
- ✔ **To select an object placed by a master page,** press Shift+⌘ or Ctrl+Shift while you click.
- ✔ **To select an object that is completely behind another object,** ⌘+click it or Ctrl+click it.
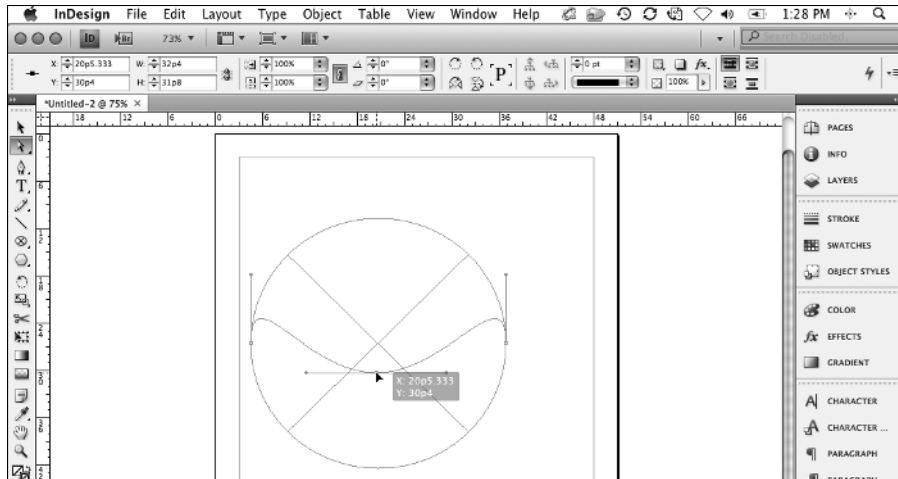
Direct Selection tool

The Direct Selection tool is what you use to work on the contents of a frame, not the frame itself. For example, you can use the Direct Selection tool to select individual handles on objects to reshape them or to move graphics within their frames.

Here's how the Direct Selection tool works:

- ✔ **To select an object to reshape it,** click the object to display anchor points on the edges (the anchor points are hollow handles that you can select individually, as shown in Figure 1-3). You can drag the anchor points to reshape the object.
- ✔ **To select objects placed by a master page,** Shift+⌘+click or Ctrl+Shift+click, as with the Selection tool. The Direct Selection tool lets you easily select objects behind other objects and select items within groups.
- ✔ **To move a graphic within its frame,** click inside the frame and drag the graphic.
- ✔ **To move a frame but leave the graphic in place,** click an edge of the frame and drag it.

Figure 1-3:
Reshape an item with the Direct Selection tool by clicking and dragging an anchor point.

Position tool

Meant to mimic PageMaker's Crop tool to help former PageMaker users adjust to InDesign, the Position tool, which you access from the pop-out menu in the Direct Selection tool, combines some aspects of the Selection tool with some aspects of the Direct Selection tool:

✔ As with the Selection tool, you can resize an object's frame by dragging its handles.

✔ As with the Direct Selection tool, you can click a graphic and reposition it within the frame by dragging — and that has the effect of cropping the graphic.

Using the Type tool

A very frequently used tool, the Type tool lets you enter, edit, and format text. The Type tool also lets you create rectangular text frames.

Here's how the Type tool works:

✔ **To create a rectangular text frame,** click and drag; hold the Shift key to create a perfect square.

✔ **To begin typing or editing text,** click in a text frame or in any empty frame and type away.

I explain stories and threaded text frames in Chapter 11.

Using the object-creation tools

InDesign has a bunch of tools for creating shapes. Part V covers them in more depth, but you should know about a few of them now because they create objects that can contain either text or graphics. Plus, you can also use them to draw your own shapes that you then color or otherwise embellish in your layout. Here's what you need to know:

✔ **Pen tool:** With the Pen tool, you can create simple illustrations. You use the Pen tool, which is modeled after the pen tools in Illustrator and Photoshop, to create paths (both open, such as lines, and closed, such as shapes) consisting of straight and curved segments. Give it a try — it's fun! (Chapter 7 explains how to use the tool.)

✔ **Type tool:** The Type tool lets you draw rectangular text frames, as well as type text inside them.

✔ **Line tool:** The Line tool lets you draw freestanding lines (paths) on your page. After selecting this tool, simply click and drag the mouse to draw the line. Holding the Shift key while you click and drag constrains the line angle to 45-degree increments, which is useful for creating straight horizontal and vertical lines.

✔ **Frame and shape tools:** InDesign has three frame tools (Rectangle Frame, Ellipse Frame, and Polygon Frame) and three shape tools (Rectangle, Ellipse, and Polygon). The frame and shape tools are redundant because both frames and shapes can hold text or graphics or be empty.

Because the frame and shape tools really do the same thing, you might use the frame tool when creating frames that will have their content added later. Why? Because the frames appear with a big X through them, making them easier to spot when looking for frames to fill. The shape tools create frames without that X, so it's easier to overlook them.

To create a rectangle or ellipse, choose the appropriate tool, click somewhere in the document window, and drag the mouse to another location. The rectangle or ellipse fills the area. But creating a polygon works differently, as Chapter 7 explains.

Using the navigation tools

Several tools, described in the following list, help you navigate your document so that you can move around your pages, move your pages around the screen, and change the degree of magnification to see just part of a page or to see several pages at once.

✔ **Hand tool:** The Hand tool lets you move a page around to view different portions of it or another page entirely. After selecting the Hand tool, click and drag in any direction. You can access the Hand tool temporarily without actually switching tools by pressing Option+spacebar or Alt+spacebar.

For a quick way to pan through your document, make sure that the Hand tool is active. Then click and hold the mouse. InDesign will zoom out and display a red rectangle. If you move the mouse, InDesign CS4 stops zooming and instead lets you move the rectangle to a new area of focus. Let go to have InDesign display that part of the document back at the original zoom setting. (This new zoom-and-pan navigator option replaces previous versions' Navigator panel and its features.) If the autozoom is too fast, you can use the up and down arrow keys instead to manually move through various zoom levels. And if you decide you've navigated some place you didn't mean to, just press Esc — as long as the mouse is still pressed — to start over.

✔ **Zoom tool:** With the Zoom tool, you increase and decrease the document view scale. You can highlight a specific area on a page to change its view, or you can click on-screen to change the view scale within InDesign's preset increments, which is the same as pressing ⌘+= or Ctrl+= to zoom in.

✔ **View buttons:** At the very bottom of the Tools panel is the Preview Mode button. Its pop-out menu has four preview options: Bleed mode, Slug mode, Preview mode, and Normal mode. Bleed mode shows any objects that *bleed* (extend) beyond the page boundaries, whereas Slug mode shows the space reserved for information such as crop marks and color separation names used in final output. Preview mode shows you the layout as if it were printed (no guides, bounding boxes, and so on.) Normal mode shows you any interface elements in use, such as guides, hidden characters, and story threads. You can read more about these in Chapter 3. You set these options when you create new documents or by choosing File➪Document Setup.

Using contextual menus

InDesign's contextual menu interface element is very useful. By Control+clicking or right-clicking the document, an object, elements listed in a panel (such as a list of files or styles), the rulers, and so on, you can display a menu of options for modifying whatever it is you clicked. InDesign provides a lot of options this way, and using the contextual menus to access InDesign functions is often easier than hunting through the many regular menu options and panels.

Working with Panels, Docks, and Workspaces

InDesign has so many controls and features that its designers have long ago stopped relying on menu commands to access them all. Instead, most of InDesign's features are presented as sort of miniature dialog boxes, called *panels*, that are "windows" of readily accessible options to consider when working in InDesign.

Working with panels

Panels provide an interactive method of working with features, one that lets you access the controls quickly. In many cases, panels offer the only method for performing many tasks. Figure 1-1, earlier in this chapter, shows the panels that appear on-screen by default. Note that you can access all panels — except Quick Apply and Tabs — via the Window menu, whether or not the panel is displayed on-screen at the moment.

Panels typically have three — but sometimes four — controls:

- ✔ All panels but the Attributes, Kuler, Pathfinder, Script Label, Story, and Tools panels have a flyout menu, which provides a pop-up menu of controls relevant to that panel.

- ✔ Any *active panel* — meaning it's displayed in front of any others in its panel group so that you can actually modify its settings — has a close control to remove the panel from the panel group. This control isn't a way to switch to another panel in that panel group — to do that, just click the tab of the panel you want to work with. (If you remove a panel by mistake, go to the Window menu to open it again.)

✔ Any active panel has a collapse control (the >> icon). For panels in the dock, clicking that icon collapses it back into the dock. For panels not in the dock (that is, for *floating panels*), collapsing them shrinks the panel to a much smaller size to get them out of the way. When collapsed, these panels will have a << icon to expand them again. (The Tools panel is an exception: clicking the >> icon changes it to a two-column layout, while clicking the << icon changes it to a one-column layout.)

✔ *Some* panels have an expand/collapse control. Click the control to show more or fewer options. (If all options are displayed, clicking the control will shorten the panel and hide some of the advanced options; if only the basic options are displayed, clicking the control lengthens the panel and shows all the options.) Figure 1-4 shows examples of collapsed and expanded panels.

Figure 1-4: An example of a panel collapsed (left) and expanded (right).
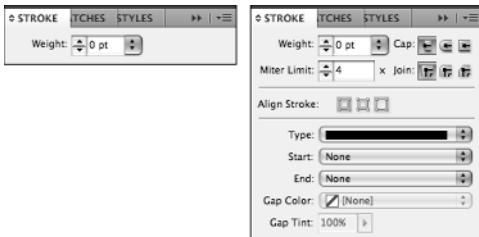
InDesign CS4 adds several new panels: Conditional Text (see Chapter 21), Connections (a quick way to go to Adobe's online resources), Kuler (see Chapter 6), and Preflight (see Chapter 23). The Buttons panel replaces the old States panel (see Chapter 24). Gone are the Command Bar and Navigator panels.

To better suit your working style, you can drag panels by their tabs to move

REMEMBER

All but three panels have a tab, which contains its name, to help you select the desired panel without having to go to the Window menu. The three special panels (without tabs) are the Tools, Control, and Quick Apply panels. Unlike the rest of InDesign's panels, they can't be grouped with other panels, so you don't need a tab to select them. Also, note that the Quick Apply panel is the only one not available via the Window menu; instead, use the lightning-bolt icon to open it from the Control panel and several other panels; you can also choose Edit➪Quick Apply (⌘+Return or Ctrl+Enter).

To quickly select a panel, just click its tab from its open panel group. When a panel is active, its controls have the following characteristics:

- ✔ **To display and select an option,** click a pop-up menu or an iconic button; the changes take effect immediately.

- ✔ **To place a new value in a field,** highlight the value that's already in the field and enter the new value. Note that fields accept values in all supported measurement systems, as described in the "Specifying measurement values" section, earlier in this chapter. To implement the new value, press Shift+Return or Shift+Enter. To get out of a field you've modified, leaving the object unchanged, press Esc.

- ✔ **To increase or decrease the value in the field,** use the clickable up and down arrows where available.

- ✔ **To use math to perform changes,** enter calculations in the field. You can add, subtract, multiply, and divide values in fields by using the following operators: +, –, * (multiply), and / (divide). For example, to reduce the width of a frame by half, type **/2** after the current value in the Width field. Or, to increase the length of a line by 6 points, you can type **+6** next to the current value in the Length field. You can also use percentages in fields, such as 50%, which adjusts the current value by that percentage.

As with the tools, if you make sure that Tool Tips are enabled in the Interface pane of the Preferences dialog box (choose InDesign➪Preferences➪Interface [⌘+K] or Edit➪Preferences➪Interface [Ctrl+K]), you'll get some ideas as to what the panel iconic buttons and fields do.

TIP

If panels are getting in your way, you can make them all disappear by pressing Tab — as long as the Type tool is not active and the text cursor is active within a text frame, of course. Press Tab to get your panels back.

Working with docks

Docks have controls to collapse and expand them. Click the double-arrow iconic button at a dock's upper corner to collapse or expand the dock. You can also resize the main dock by dragging its resize handle. Figure 1-5 shows the dock controls and what they look like when expanded and collapsed.
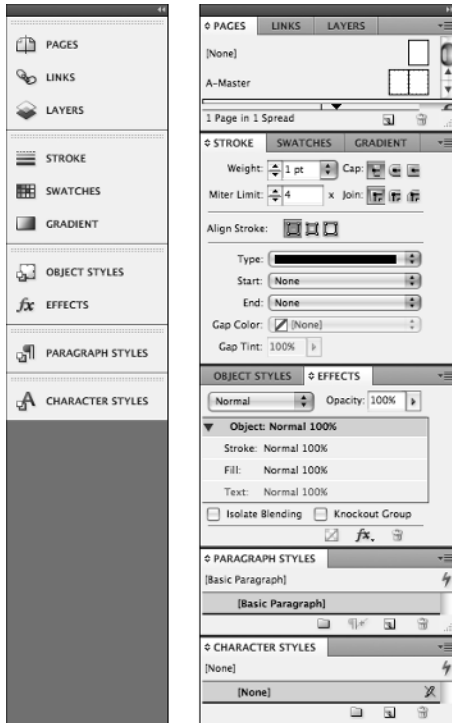
Figure 1-5:
The col-
...ed dock
...rols are
...default
...ay (left),
...you can
...expand
...m to see
...options
(right).

Working with workspaces

Although you can rearrange InDesign's panels to suit your needs, rearranging
again and again as you switch from one task to another can be a real chore.
For example, you may open several of the table- and text-oriented panels
when working on text, but then close them and open the graphics- and

Surveying the Menus

Although InDesign relies heavily on its panels to present its rich capabilities, it also uses traditional menus. In some cases, you can use menus instead of panels; in others, you must use a menu command; in still others, you must use a panel (such as for the data merge and object alignment features).

InDesign for Windows has nine menus, while InDesign for Macintosh has ten:

- ✔ **InDesign (Macintosh only):** This menu contains the Preferences menu, where you set much of InDesign's behavioral defaults. You can also configure plug-ins here. Other functions are standard for all Mac programs, including hiding and quitting the program. Note that none of these menu items' functions are available in panels.

- ✔ **File:** This menu is where you open, create, close, save, export, and set up documents and books; where you import text and graphics; where you print documents and prepare them for commercial printing; and where you set basic user information. Note that none of these menu items' functions are available in panels, except for the Preflight feature.

- ✔ **Edit:** This menu lets you cut, copy, and paste elements; edit, spell-check, and do search-and-replace operations across entire stories and set up story for the InCopy add-on program; adjust and manage color settings; set up and change keyboard shortcuts and menu preferences; apply various styles to selected objects and text; and undo and redo recent actions. In Windows, you also set preferences and quit the program from this menu. Note that these menu items' functions, except for Quick Apply, aren't available in panels.

- ✔ **Layout:** With this menu, you add, delete, rearrange, and navigate pages; change margins and guides; automatically resize a page and its objects; set up page numbering and sections; and create and format tables of contents. Note that these menu options' functions — except for the Pages, page-navigation, and Numbering & Section Options menus — aren't available in panels.

- ✔ **Type:** With this menu, you adjust typographic attributes such as size and font, insert special characters, work with footnotes, add placeholder text; and control the on-screen display of special characters such as spaces. Note that the Find Font, Change Case, Type on a Path, Document Footnote Options, Text Variables, Insert Character, Fill with Placeholder text, and Show Hidden Characters menu items' functions aren't available though panels. Also note that the separate Notes menu found in InDesign CS3 has moved into this menu as a new menu item.

✔ **Object:** You use this menu to change the shape, size, location, and other attributes of objects, such as frames and lines; apply special effects to objects; insert multimedia effects such as buttons; and control display redraw speed. Note that the Text Frame Options, Anchored Object, Corner Options, Clipping Path, and Convert Shape menu items' functions aren't available through panels.

✔ **Table:** Use this menu to create, change, and format tables and cells. Note that this menu's functions are available through panels.

✔ **View:** This menu lets you control the display of your document, from zoom level to whether guides, rulers, and frame edges appear. Note that none of these menu items' functions, except for Screen Mode and the zoom controls, are available in panels.

✔ **Window:** This menu is where you manage the display of document windows and panels, as well as where you set up and work with workspaces. The window display and workspace functions aren't available via panels.

✔ **Help:** Use this menu to access InDesign's help system and manage product activation and registration. In Windows, this menu also lets you manage plug-ins. Note that none of these menu items' functions are available in panels.