Chapter 1

What InDesign Can Do for You

InDesign CS4 is the sixth version of Adobe's flagship publishing tool, a product that came into its own with the third version (CS, which stands for Creative Suite). Widely regarded as the best layout tool today, InDesign CS4 continues to benefit from continued investment by its makers at Adobe Systems.

Every new version of InDesign has brought significant new capabilities to your fingertips, and CS4 is no different. This new version introduces several key additions that make it easier to produce flexible documents, such as the ability to export files for use in Flash multimedia projects, as well as enhanced capabilities for its conditional text feature that lets a document have different versions of, say, a chapter heading or copyright line. Catalog publishers, for example, will love these additions.

Adobe has also improved lots of features — some big, some small — to both simplify the product's use and to enhance its capabilities. For example, the new "smart guides" feature makes it much easier to align, resize, rotate, and place objects precisely when you're using the mouse. The Links panel has been redesigned to better match how Adobe Bridge works, as well as make it easier to substitute FPO (for position only) files quickly. And InDesign now alerts you as you're working if your document has any issues that may affect final output quality.

But if you're upgrading from InDesign CS3, what you'll notice most is a slightly cleaned-up user interface — using modern standards such as tabbed panes to hold documents, as well as simpler icons in the panels — rather than obvious new features. InDesign CS4 has many nice additions, but it's very much a continuance of what you know from CS3. Most of its enhancements are subtle, the kind you may not even notice right away.

IN THIS CHAPTER

Learning what InDesign can do

Understanding global and local control

Identifying InDesign terminology

CROSS-REF If you want a quick overview of what's new in InDesign CS4, flip forward to Appendix B.

InDesign users fall into two camps: Recent converts from QuarkXPress or even the long-defunct PageMaker and people who've used at least one previous version of InDesign. If you're an experienced user of previous InDesign versions, you already know the InDesign approach. That's great — you're a step ahead! Feel free to skip this chapter or just skim it for a refresher. But if you're new to InDesign, please read on.

InDesign's Flexible Approach

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). For years, most chose the latter. But with InDesign, you can choose both, which is a key reason why it is now so widely acknowledged as the best publishing tool. InDesign's flexible approach is important for both novice and experienced users because there is rarely a one-size-fits-all answer for all your design challenges. Sometimes (for example, if your project is a onetime 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 you don't need to reinvent the wheel for common documents.

InDesign can handle sophisticated tasks such as magazine and newspaper page layout, but its simple approach to publishing also makes it a good choice for smaller projects such as 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-REF 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 may seem that way to experienced users. It is designed from the ground up as an *electronic* publishing tool. That means you can easily send documents to service providers 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 Portable Document Format (PDF) or the Web's XHTML format, though the latter capability assumes that you'll redesign the content's appearance in a Web editing program such as Adobe Dreamweaver. These electronic files can include interactive features such as forms and sounds. And InDesign uses a whole bunch of automation techniques — from text variables through sharable styles and swatches — to ease the effort required to produce and maintain your documents.

CROSS-REF For more in-depth coverage of output and electronic-document fundamentals, see Parts VII and VIII, respectively.

In this chapter, I detail the wide range of uses and features of InDesign, point out the ways in which InDesign can be useful to you, and describe 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.

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 6)
- Text styles (see Chapter 19)
- Table and cell styles (see Chapter 21)
- Object styles (see Chapter 12)
- Stroke styles (see Chapter 11)
- Text variables (see Chapter 22)
- Sections of page numbers (see Chapter 5)
- Color definitions (see Chapter 7)
- Hyphenation and justification (see Chapter 17)
- Libraries (see Chapter 6)

NOTE **Styles and master pages are the two main global settings that you can expect to override locally throughout a document. This is the case 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 all of a publication's specific content.**

Local tools include:

- Frame and shape tools (see Part III and Chapters 26 and 27)
- Character and paragraph tools (see Chapters 16 through 19)
- Graphics tools (see Part VI)

InDesign Vocabulary 101

InDesign comes with its own terminology, much of it adopted from other Adobe products. The general terms include the following:

- **Frame:** The container for an object, whether text, graphic, or color fill.

- **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 or other resources such as PDF files.)

- **Package:** The collection of all files needed to deliver a layout for commercial printing. InDesign has a package feature that collects all these files for you.

- **Pane:** A section of a dialog box or panel whose options change based on the set of controls you've selected in the dialog box or panel.

- **Panel:** A container for controls that stays on-screen even when you aren't using it (in contrast to a dialog box, which appears only while you are using it). Panels can be docked to the right edge of the screen or free floating. Panels can be combined into a single container called a *panel group.*

- **Path:** A shape in which the endpoint and start point are separate, keeping the shape "open." Lines are a straight type of path.

- **PDF:** The Adobe Portable Document Format is the standard for electronic documents. No matter what kind of computer it is viewed on (Windows, Macintosh, Palm, 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 as PDF files.

- **Place:** To import a graphics file or text file.

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

- **Stroke:** The outline of an object (whether a frame, a line, or an individual text character).

- **Thread:** The links between text frames that route stories among them.

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 single-page display ads, 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 a *drop cap* (a large initial letter set into a paragraph of type, like the one that starts each chapter in this book) as a character option in the Character panel, or you can create a *character style* (formatting that you can apply to any selected text, ensuring that the same formatting is applied each time) that contains the drop-cap settings and apply that style to the drop cap. The 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 doing something, the more often you should use a global tool (such as 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 that you need them to appear on every page.

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 and panels), 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.

CROSS-REF Chapter 3 covers how to apply measurement values and set your preferred defaults.

Summary

InDesign offers a strong set of features for professional publishers working on brochures, magazines, advertisements, and similar publications. It combines the ability to create documents on the fly with the ability to create structured documents for use as templates, allowing for efficient while still creative design workflows.