



ADOBE® INDESIGN® CS5 CONVERSION GUIDE

A HANDS-ON RESOURCE FOR SWITCHING FROM QUARKXPRESS TO INDESIGN CS5

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Adobe InDesign CS5 Conversion Guide

A hands-on resource for switching
from QuarkXPress to InDesign CS5

If you're reading this guide, it's because you've joined—or are thinking of joining—a growing group of QuarkXPress users who have discovered the many benefits of using Adobe® InDesign® CS5 software. InDesign is an immensely powerful page layout program, with extraordinary typographic capabilities, innovative graphics handling and page layout features, extensive productivity tools, versatile long document and printing features, support for creating interactive documents, and expansive automation capabilities.

This booklet was created specifically to help users of QuarkXPress version 3, 4, 5, or 6 make the switch to InDesign as quickly and smoothly as possible.

If you're a long-time QuarkXPress user, you'll find that there are many similarities between the two programs—for example, they both make use of text and graphic frames, pasteboards around spreads, and master pages.

However, there are some important differences between QuarkXPress and InDesign to adjust to. Don't worry—this booklet explains the

key differences between these two programs, and it also introduces you to powerful features available only in InDesign.

If you need more step-by-step information, refer to InDesign Help, which is accessible from within the application. Additionally, there are many Adobe and third-party resources to help you learn InDesign. See "[InDesign CS5 resources](#)" on page 56.

If you're familiar with other Adobe graphics applications, such as Adobe Photoshop® or Adobe Illustrator®, your switch to InDesign

will be even easier. All Adobe Creative Suite® applications share common commands, panels, and keyboard shortcuts, so if you're familiar with one program, learning the others is easy.

Top 10 reasons InDesign is better than QuarkXPress

Before we get into the differences between the two programs, let's take a quick look at 10 reasons why InDesign is the better program.

1. Creative Suite integration:

Effortlessly work with Photoshop and Illustrator files in your layouts, including 3D or layered Photoshop

artwork. Open your layouts in Adobe Flash® CS5 Professional. Export content as XHTML for use in Adobe Dreamweaver®. And set up better editorial workflows through Adobe InCopy® integration.

2. Collaboration: InDesign lets you collaborate with colleagues and clients, allowing you to share your screen for real-time discussions.

3. Typography: With its rich OpenType® support and features such as Optical Kerning, Margin Alignment, and the Paragraph Composer, InDesign is the clear choice for high-quality typesetting.

4. Customizable workspace: When you customize your workspace, you become more efficient. InDesign offers a wide variety of customizable options, including tabbed documents, tasked-based workspaces, editable keyboard shortcuts, and even which menu commands are visible.

5. Production: InDesign streamlines your production tasks. The customizable Preflight panel checks your layout for potential errors while you work. Plus, features such as Smart Guides,

High Quality Display mode, and Separations Preview boost efficiency and reduce proofing cycles.

6. True PDF support: Built from the ground up to support international standards, InDesign can produce PDF files better and faster than QuarkXPress.

7. Creative effects: You can apply Photoshop effects (such as drop shadows, embossing, and feathering) to any object on your page, including text, images, and vector graphics. Plus, InDesign supports true Photoshop and Illustrator transparency, saving you time and letting you unleash your creativity.

8. Long documents: If you work with long text documents, you need powerful InDesign text features such as conditional text, cross-references, GREP styles, and automatic numbered lists.

9. File management: The Links panel in InDesign is second to none in its ability to help you manage your linked graphics and text files.

10. Cross-media publishing: Designers today must publish across several media, including PDF,

SWF, and HTML. InDesign gives you tools to repurpose your content and create engaging interactive documents, no matter where your audience wants to view them.

Migration strategies

Of course, to become more efficient and productive requires that you learn new features and sometimes even new workflows. Remember that it will likely take a little time to become as proficient in InDesign as you were in QuarkXPress. However, the benefits far outweigh this temporary learning curve.

If you're in a large workgroup that is migrating to InDesign, you might consider first training a core group of users who can become informal trainers over time and then train everyone else.

This document should help you and your colleagues get up to speed quickly in InDesign. Soon, you'll be creating documents with the skill and confidence you've acquired as a QuarkXPress user. Even better, you'll quickly learn how to use all of the InDesign features you've never had before. And your layouts will never be the same.

Learning feature names

Many of the terms in InDesign CS5 menus, dialog boxes, and panels are identical to and have the same meanings as terms used in QuarkXPress. For example, words like *page*, *book*, *library*, *Kerning*, *leading*, *horizontal scale*, *group/ungroup*, *lock/unlock*, and *pasteboard* have essentially the same meaning in both programs. In some cases, the two programs use different terms for the same thing. Once you understand the difference in terms, you're likely to find that associated concepts are quite similar. Here are some key terms that differ between QuarkXPress and InDesign.

QuarkXPress term | InDesign term

Box | **Frame**

QuarkXPress has picture boxes, text boxes, and boxes with no content, while InDesign has graphics frames, text frames, and unassigned frames.

Item menu | **Object menu**

In QuarkXPress, you control boxes and lines in the Item menu; in InDesign, it's the Object menu.

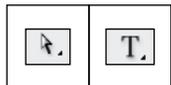
Item tool | **Selection tool**

You use the Selection tool in InDesign (called the Item tool in QuarkXPress) to select objects, move frames and their contents, and crop the contents of a graphics frame.



Content tool | **Direct Selection and Type Tools**

In QuarkXPress, you use the Content tool when you want to move a picture within a picture box or modify text within a text box. In InDesign, you can enter or format text with the Type tool, or click and drag the Type tool to create a new text frame. To move a graphic within its

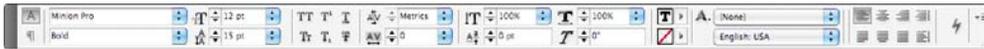


frame, choose the Selection tool, place the cursor over the image, and drag the round Content Grabber that appears in the center of the graphic. You can also use the Direct Selection tool to move a graphic within its frame, as well as to reshape the frame by dragging any of its anchor points or line segments.

Measurements palette | **Control panel**

In InDesign, the Control panel (Window > Control) is similar to the Measurements palette in QuarkXPress. The Control panel is context-sensitive, which means that the controls displayed in the panel depend on the type of object selected, as well as the selected tool.

When the Type tool is selected, the Control panel displays controls for modifying character or paragraph attributes, depending on which of two icons is selected at the left of the panel. When table cells are selected, the Control panel displays table-formatting controls. When an object is selected with the Selection tool, the Control panel displays object-related controls.



Control panel: Character options



Control panel: Paragraph options



Control panel: Object options



Control panel: Table options

The Control panel is context-sensitive. The controls it displays change depending on the currently selected object and tool. For example, when an object is selected with the Selection tool, the Control panel lets you scale, rotate, or flip it.

Document Layout palette | Pages panel

The Pages panel in InDesign is very similar to the Document Layout palette in QuarkXPress, though the Pages panel lets you display and manage your pages in a number of ways that QuarkXPress does not. For example, InDesign shows thumbnails of each page.

Line | Path

Both programs let you create straight or Bezier-curved lines (called paths in InDesign). You can place text or pictures inside the boundary of these InDesign paths, whether they are open paths or closed shapes.

Starburst tool | Polygon tool

While QuarkXPress has a Starburst tool, InDesign has a Polygon tool (paired with the Rectangular and Ellipse tools in the Tools panel). Double-click the tool to set the Number of Sides and Star Inset values.

Get Picture/Get Text; Import | Place

In QuarkXPress, you import text or graphics using the Get Picture or Get Text features (called Import in QuarkXPress 7 or later). InDesign lets you place graphics and text with or without an existing frame. To place text

or graphics, choose File > Place, locate the file you want, and click Open. If an empty frame is selected, the text or graphics content will appear in it automatically. If no frame is selected, you can click to create a frame and place the content into it, or drag to create a frame of a specific size. For more information, see “Importing text and graphics” on page 22.

Note that you can also place multiple files at the same time in InDesign, which is a great time-saver.

Background color | Fill

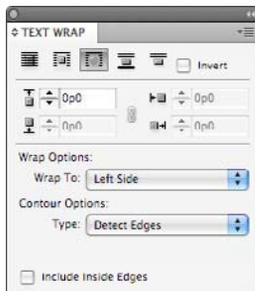
In QuarkXPress, you use the Modify dialog box or the Colors panel to apply a background color or blend to boxes. In InDesign, you fill objects by selecting the Fill icon in the Tools panel or the Swatches panel, and then selecting a color, tint, or gradient in the Swatches, Tools, Color, or Gradient panel. You can also choose a color from the Fill button in the Control panel.

You can change the fill color of any object—including frames, selected text, and paths—to a solid color, a tint, a gradient, or None (fully transparent). For more information, see “Stroke and fill” on page 13.

Frame | Stroke

QuarkXPress is limited to putting frames around boxes and changing line width. With InDesign, you can add a stroke to any InDesign object, including a path, frame, or selected text, with the Control or the Stroke panel. Then apply a color, a tint, or a gradient to the stroke using the Swatches, Color, Gradient, Control, or Tools panel.

Runaround | Text Wrap



Both programs let you specify how text flows around an obstructing object. In QuarkXPress, you use the Runaround dialog box; in InDesign, you use the Text Wrap panel. For more information, see “Text wrap” on page 16.

Linking | Threading

In QuarkXPress, you use the Linking and Unlinking tools to control text flow through multiple text boxes. In InDesign, each text frame has an in port and an out port that let you flow text through multiple frames, a process called “threading” (see “Text threading” on page 13).

Table tool | Insert Table

To make a table object in QuarkXPress, you must use the Table tool. In InDesign, tables are always anchored inside text frames. After clicking an insertion point in a text frame with the Type tool, you can make a table by choosing Table > Insert Table. For more information on creating tables, see “Working with tables” on page 28.

H&Js | Hyphenation and Justification

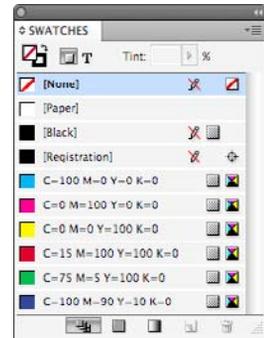
QuarkXPress handles text spacing and hyphenation by defining styles in the H&Js dialog box. In InDesign, you can change these settings on individual paragraphs using the Hyphenation and Justification dialog boxes, found in the Paragraph panel menu. You can also edit hyphenation and justification values when defining each paragraph style in your document.

Color | Swatch

In InDesign, named colors are called swatches. A swatch can be a solid color, a tint of a solid color, a mixed ink swatch (see the next page), or a gradient.

Choose Window > Color > Swatches to open the Swatches panel, where you can create, apply, delete, and load swatches.

InDesign also has a Color panel (Window > Color > Color) that lets you mix and apply unnamed colors and, optionally, add them to the Swatches panel.



White (color) | Paper (swatch)

In InDesign, the Paper swatch simulates the color of the paper on which you’re printing and is analogous to the color White in QuarkXPress.

Blend | Gradient

Unlike QuarkXPress, which limits you to two-color blends, InDesign lets you include as many colors as you want in a gradient, and you can also adjust the midpoint

between any two colors in a gradient. For more information, see “Creating and applying gradients” on page 39.

Multi-Ink Color | Mixed Ink Swatch

In QuarkXPress, you can combine shades of two or more spot or process colors to create a multi-ink color. In InDesign, you can combine a spot color with other spot and process colors to create a mixed ink swatch. You also have the option to combine incremental percentages of two colors to create mixed ink groups. To create a mixed ink swatch, choose New Mixed Ink Swatch from the Swatches panel menu (Window > Color > Swatches).

Save Backward | Export InDesign Markup (IDML)

QuarkXPress lets you save a document that can be opened by the previous version of the program. To do this in InDesign, choose File > Export, and then choose InDesign Markup (IDML) from the Format menu (Mac OS) or the Save As Type menu (Windows®). The exported file will be given an IDML extension and can be opened in the previous version.

Collect For Output | Package

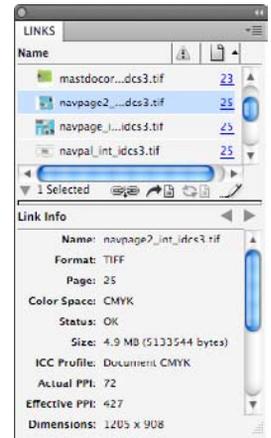
In QuarkXPress, you use the Collect For Output command to save a copy of a document and its linked files in a single folder for handoff to a service provider. In InDesign, you choose File > Package. This command also offers the option to collect the fonts you have used.

Font Usage | Find Font

To find a list of every font used in a document, you go to the Usage dialog box in QuarkXPress. In InDesign, you can choose Type > Find Font.

Picture Usage | Links

In QuarkXPress, the Pictures pane of the Usage dialog box displays information about imported pictures. In InDesign, you manage the status of imported graphics and text in the Links panel (Window > Links). You can also obtain detailed information about each link in the Link Info section of the panel, including file type, resolution, and color space. To edit the file in its original application, click the Edit Original button  in the Links panel.



No Style | Break Link to Style

Each QuarkXPress document has two default paragraph styles: No Style and Normal. InDesign documents have one: Basic Paragraph Style, which is similar to Normal. To remove the link to a paragraph style, select the paragraph, and then choose Break Link To Style from the Paragraph Style panel menu.

XTensions | Plug-ins

XTensions are software modules that add functionality to QuarkXPress. InDesign plug-in modules (developed by Adobe and third-party software developers) add features to InDesign. Plug-ins are stored in the Plug-Ins folder within the InDesign program folder. For a complete list of available plug-ins for InDesign, visit www.adobe.com/products/plugins/indesign.

Top 10 differences you need to understand

When you start using InDesign, you'll quickly find a number of similarities between it and QuarkXPress: Both programs display spreads on individual pasteboards; both have standard methods for saving and opening documents and templates; each has a “toolbox” and floating panels. InDesign was built to be intuitive and easy for QuarkXPress users to learn. However, there are some significant differences between the two programs that you must understand if you want to be proficient in InDesign.

Modify dialog box replacements

In QuarkXPress, the Modify dialog box contains controls for modifying items, and most users open this dialog box frequently as they build pages. InDesign doesn't have a comparable dialog box. Instead, controls for modifying objects are available in the Control panel, as well as in other panels such as the Swatches, Text Wrap, and Stroke panels.

To modify the placement of text within a text frame—including number of columns, text inset values, and placement of the first line of text—choose Object > Text Frame Options.

Frames are frames

InDesign has graphic, text, and unassigned frames, similar to those in QuarkXPress. You can easily convert a frame from one type to another. For example, if you select a text frame, choose File > Place, and choose an image, InDesign changes the frame to a graphic frame and replaces any text with the placed image.

Similarly, if you click with the Type tool on an empty graphic frame or unassigned frame, InDesign converts it to a text frame. If you prefer that InDesign not do this, open the Preferences dialog box (Command+K/Ctrl+K), choose the Type pane, and deselect the Type Tool Converts Frames To Text Frames option.

Here are several more facts about frames that you should note:

- The Rectangle Frame tool creates graphic frames; the Rectangle tool creates unassigned frames.
- Unassigned frames that have a fill color of None are “empty,” so you can click through them to objects behind them. To learn how to select objects behind text and graphic frames, see [“Selection tool techniques”](#) on page 36.
- Any path can be a frame. For example, you can draw an open U-shaped path with the Pencil tool or the Pen tool, and then place text or a graphic inside the shape.

Master page objects

In QuarkXPress, any object on a master page can immediately be selected and changed on a document page. InDesign protects master-page objects from accidental changes. Master-page objects have dotted, rather than solid, edges.

To select a master object on a document page, you must override it by pressing Shift+Command (Mac OS) or Shift+Ctrl (Windows), and then clicking the object. You can also choose Override All Master Page Items from the Pages panel menu.

If you want to prevent a master object from being selected on a document page, select the object on the master page, and then deselect Allow Master Item Overrides On Selection in the Pages panel menu.

Text leading

InDesign treats leading as a character attribute, not a paragraph attribute. Leading controls are displayed in the Character panel (Type > Character) and also in the Control panel when

Tip:

SELECT A TOOL QUICKLY

You can quickly choose any tool in the Tools panel by pressing a single key, such as *P* for the Pen tool or *T* for the Type tool. (Be sure that you don't have an active insertion point in a text frame, or you'll simply type the letter.)

Selection tool

Direct Selection tool

Page tool

Gap tool

Type tool, Type On A Path tool

Line tool

Pen tool, Add Anchor Point tool, Delete Anchor Point tool, Convert Direction Point tool

Pencil tool, Smooth tool, Erase tool

Rectangle Frame tool, Ellipse Frame tool, Polygon Frame tool

Rectangle tool, Ellipse tool, Polygon tool

Scissors tool

Free Transform tool, Rotate tool, Scale tool, Shear tool

Gradient Swatch tool

Gradient Feather tool

Note tool

Eyedropper tool, Measure tool

Hand tool

Zoom tool

Swap Fill And Stroke

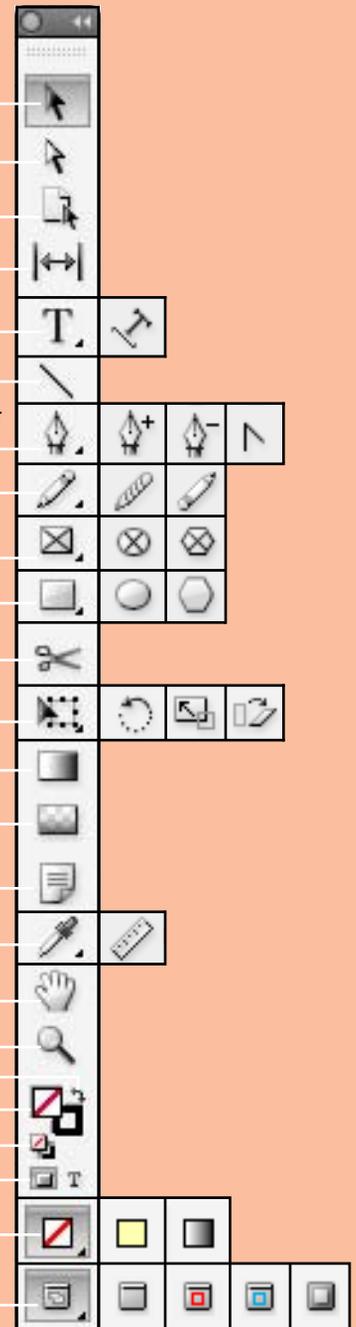
Fill and Stroke boxes

Default Fill And Stroke

Formatting Affects Container/Text

Apply: None, Color, Gradient

View modes: Normal, Preview, Bleed, Slug, Presentation

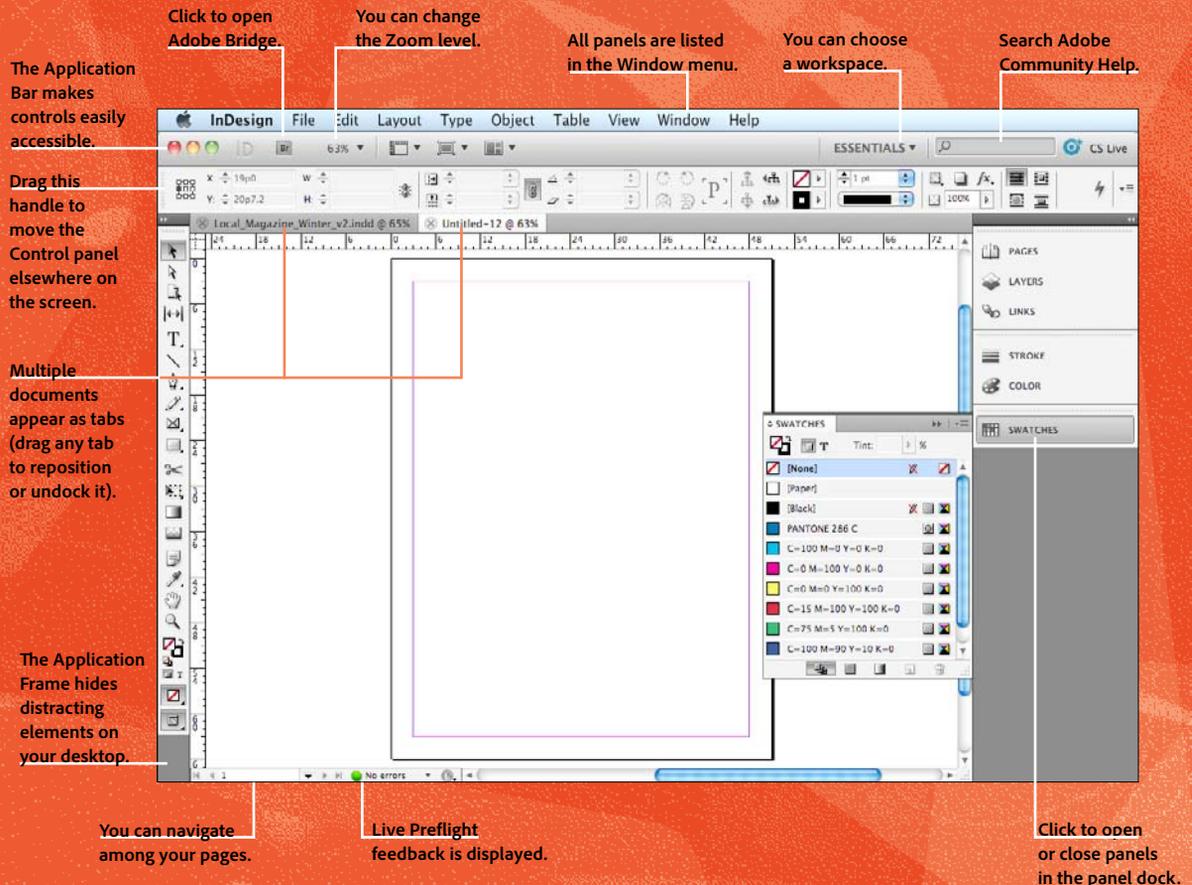


Document window

While at first glance InDesign may appear to be very different from QuarkXPress, many of the features are actually similar. Take a moment to get acquainted with the location of panels, menus, and controls in the document window below.

Here are some tips for managing the panels you'll be working with:

- Workspaces remember the location of each panel onscreen, including whether it's visible or hidden. You can choose among preset workspaces from the Workspace menu on the Application Bar, or create your own.
- You can dock a panel to the edge of your screen by dragging its tab to the left or right edge.
- When the insertion point is not blinking, press Tab to show/hide all panels, or Shift+Tab to show/hide all panels except the Tools panel and the Control panel.
- Drag the left edge of the dock to expand or collapse a stack of panels and display icons. When you widen a stack, icons and labels are displayed.



the Character Formatting Controls icon  is selected at the left side of the Control panel. The largest leading value on each line in a paragraph sets the spacing for that line.

While this is a more traditional approach to leading, it can be frustrating to those accustomed to the way QuarkXPress works. If you prefer that every character in a paragraph have the same leading value, you can open the Preferences dialog box, choose the Type pane, and then select the Apply Leading To Entire Paragraphs option.

Text threading

You won't find any tools for linking and unlinking text frames in the InDesign Tools panel. That's because linking and unlinking—or threading, as it's called in InDesign—is accomplished via the in and out ports on text frames.

The in port of a text frame is a small square just below the frame's upper left corner; the out port is just above the lower right corner. If an out port is displayed in red with a red plus sign within, it indicates there is overset text. For more on viewing or editing overset text, see [“Story Editor” on page 44](#).

To add a new text frame after an existing text frame, select either the Selection tool or the Direct

Selection tool, click the existing frame, and then click the frame's out port. A loaded icon is displayed. At this point, you can:

- Click or drag to create a new text frame on your page.
- Click within another existing text frame to thread to that frame. The frame you click may be empty or contain text.

Use the same process to add a text frame in front of an existing frame, except begin by clicking the frame's in port.

To unlink two threaded text frames, double-click either the out port of the first frame or the in port of the second frame. You can see how frames are threaded together when the Selection tool is selected by choosing **View > Show Text Threads**.

Stroke and fill

QuarkXPress limits the kinds of objects to which you can apply a Background Color or Frame. In InDesign, you can select any text, path, or frame, and apply a solid, tint, or gradient fill or stroke color from the Fill or Stroke button in the Control panel. Alternatively, you can choose the Fill or Stroke icon at the bottom of the Tools panel, or at the top of the Swatches or Color panel. Then do one of the following:

- Click a color swatch in the Swatches panel.
- Specify a color in the Color panel.
- Define a blend from one color to another in the Gradient panel.
- Choose Apply Color, Apply Gradient, or Apply None from the Apply Color pop-up menu at the bottom of the Tools panel.

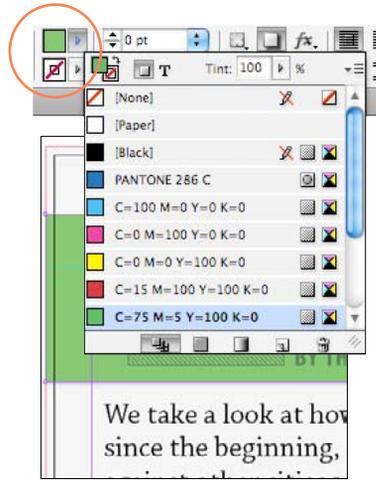
Note that you can apply a color, tint, or gradient to the fill or stroke of text characters without converting the text to outlines. (If you do choose Type > Create Outlines, the resulting text is no longer editable.)

If you have one or more text frames selected with the Selection tool, you can apply a fill or stroke to the text within each frame by first clicking the Formatting Affects Text icon **T** in the Tools panel, Swatches panel, or Color panel. If instead you select the Formatting Affects Container icon **□**, the fill or stroke is applied to the selected frame rather than to the text.

The Default Fill And Stroke icon **□** in the Tools panel lets you return the Fill and Stroke icons to their default settings. The Swap Fill And Stroke icon **↔** reverses the colors of the stroke and fill icons.

Selecting images versus frames

In QuarkXPress, you must select the Content tool before you can modify either text or a graphic. InDesign doesn't have a single tool for modifying both text and graphics. Instead, if you want to modify a graphic without affecting its frame, choose the Selection tool, place the cursor over the graphic, and click or drag the circular Content Grabber. Alternatively, you can double-click the frame—if it is a text frame, InDesign switches



The Fill and Stroke buttons in the Control panel let you apply solid colors, tints, and gradients, even if all other panels are closed.

to the Type tool and places the text cursor where you clicked. If it is a graphic frame, InDesign selects the graphic inside the frame.

For example, if you want to move an image into another frame, click its Content Grabber with the Selection tool (to select the graphic inside the frame), choose Edit > Cut, select the destination frame, and choose Edit > Paste Into.

Similarly, you can change the color of imported black-and-white and grayscale graphics (but not of color graphics) by first selecting the graphic and then clicking a color in the Swatches panel.

The tool you use when scaling or resizing a graphic also determines the result. For more information on scaling, resizing, and cropping, see

“Working with graphics and frames” on page 23.

Ruler guides are objects

To create a ruler guide, click the horizontal or vertical ruler, and drag the pointer onto a page or the pasteboard. If you release the pointer over a page, the guideline extends across the page. If you release the pointer over the pasteboard, the guideline spans the page and pasteboard. You can also double-click a ruler to create a guideline where you click. (Hold down the Shift key while dragging or double-clicking to add the guide at the nearest ruler tick mark.)

Ruler guides behave much like objects you create with the drawing tools. You can select a ruler guide by clicking it with the Selection, Direct Selection, or Position tool, and you can select multiple guides by Shift-clicking or by clicking and dragging over two or more guides.

Top 25 shortcuts you should know

Every power user knows that one of the best ways to get efficient in a program is to learn the keyboard and mouse shortcuts. For example, most people know that you can create a new document by pressing Command+N (Mac OS) or Ctrl+N (Windows).

Here's a handful of the most useful shortcuts you should know when using InDesign.

However, note that InDesign lets you edit any keyboard shortcut, or assign a shortcut to any of the several hundred features that don't have a default shortcut. To edit or assign a custom shortcut, choose Edit > Keyboard Shortcuts.

In the Keyboard Shortcuts dialog box, you can choose a different set (such as Shortcuts For QuarkXPress 4.0) or define your own set by clicking the New Set button.

To see a list of every shortcut in InDesign, click the Show Set button or see InDesign Help.

Feature	Mac OS	Windows
Place (text or image)	Command+D	Ctrl+D
Export	Command+E	Ctrl+E
General Preferences	Command+K	Ctrl+K
Add Page	Command+Shift+P	Ctrl+Shift+P
Paste Without Formatting	Command+Shift+V	Ctrl+Shift+V
Paste Into	Command+Option+V	Ctrl+Alt+V
Paste In Place	Command+Option+Shift+V	Ctrl+Alt+Shift+V
Select All	Command+A	Ctrl+A
Deselect All	Command+Shift+A	Ctrl+Shift-A
Undo	Command+Z	Ctrl+Z
Redo	Command+Shift+Z	Ctrl+Shift+Z
Show/hide all panels	Tab	Tab
Jump to Control panel	Command+6	Ctrl+6
Toggle Character and Paragraph Formatting in Control panel	Command+Option+7	Ctrl+Alt+7
Selection tool ¹	Esc	Esc
Selection tool ²	V	V
Text Frame Options	Command+B	Ctrl+B
Story Editor	Command+Y	Ctrl+Y
Toggle Normal and Preview Mode ²	W	W
Quick Apply	Command+Return	Ctrl+Enter
Fit Page In Window	Command+0	Ctrl+0
Fit Spread In Window	Command+Option+0	Ctrl+Alt+0
Show Hidden Characters	Command+Option+I	Ctrl+Alt+I
Temporary Hand tool	Option+spacebar-drag	Alt+spacebar-drag
Preflight panel	Command+Option+Shift+F	Ctrl+Alt+Shift+F

¹Applies only when editing text in a text frame.

²Applies only when *not* editing text in a text frame.



The selected object is a native Photoshop image with a transparent background. Note that the text is on a layer above the image.

You can reposition a selected guide by dragging it, using the arrow keys on your keyboard, or entering an X or Y value in the Control panel. You can also delete, lock, cut, copy, or paste guides like any other object.

The Grids & Guides menu (View > Grids & Guides) provides several commands for showing, hiding, locking, and snapping objects to gridlines and guidelines.

InDesign also offers Smart Guides, which appear automatically as you drag, rotate, or resize objects on your page. Smart Guides help you align and distribute objects by giving you real-time feedback about the object



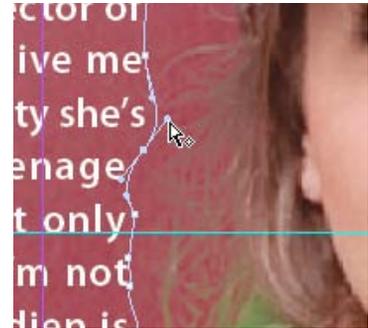
The Text Wrap panel lets you control how text wraps around an object. Here, the text wraps around the left side of the image's transparency mask.

you're moving and its relation to other objects on the page. You can enable or disable Smart Guides by choosing View > Grids & Guides > Smart Guides.

Text wrap

In QuarkXPress, you use the Runaround controls in the Modify dialog box to control the flow of text around an object; in InDesign, you use the Text Wrap panel (Window > Text Wrap).

Select an icon at the top of the Text Wrap panel to indicate how text will flow when the selected object overlaps a text frame: No Text Wrap, Wrap Around Bounding Box, Wrap



You can edit the shape of the text wrap with the Direct Selection tool.

Tip:

PREVENTING TEXT WRAP

To prevent text in a frame from wrapping around an object with a text wrap, select the text frame, choose Object > Text Frame Options, and then select Ignore Text Wrap.

Around Object Shape, Jump Object, or Jump To Next Column.

If you choose Wrap Around Object Shape, and the object is a graphic with a transparent background, you may want to choose Detect Edges, Photoshop Path, Alpha Channel, or Same As Clipping from the Type pop-up menu in the panel. These allow the text wrap to flow around the nonrectangular graphic.

InDesign normally allows text to wrap on both sides of an object. You can change this behavior in the Wrap To pop-up menu. The options are Right Side, Left Side, Both Right &

Opening QuarkXPress files

You can choose File > Open in InDesign to open documents and templates created with QuarkXPress or QuarkXPress Passport 3.3–4.11.

When you open a QuarkXPress file in InDesign, a new, untitled document is created. InDesign converts the original file information to native InDesign information. Most objects, styles, and colors are translated properly, but text may reflow differently, so proof the results carefully.

Before converting a QuarkXPress document, you should store all imported picture files in a single

folder, relink all pictures in the Pictures tab of the Usage dialog box (Utilities > Usage > Picture), and then use File > Save As to save a clean version of the document in QuarkXPress. This ensures that all links are preserved.

If your QuarkXPress document does not convert, check the original file and remove any objects that require an XTension; then save and try to convert the document again.

QuarkXPress 5.x, 6.x, 7.x, and 8.x files are stored in a proprietary format that InDesign cannot directly open.

However, a third-party developer called Markzware (www.markzware.com) offers a conversion utility called Q2ID that can convert these files.

Opening a QuarkXPress document may be efficient in the short run, but it is often better to re-create the document, making use of the unique features of InDesign, such as based-on master pages, nested styles, and object styles. Another option is to export the QuarkXPress file as a PDF and place each page of the PDF inside the InDesign document as a graphic.

Left Sides, Side Towards Spine, Side Away From Spine, and Largest Area.

While QuarkXPress limits you to flowing text around objects placed above the text box, text wrap in InDesign affects text frames above and below an object. However, if you prefer InDesign to limit its text wrap behavior, open the Preferences dialog box, choose the Composition pane, and select the Text Wrap Only Affects Text Beneath option.

Character, Paragraph, Table, and Object styles

Character and paragraph styles are great time-savers for text-intensive publications like newspapers, books,

magazines, and catalogs. InDesign also includes object styles, which you can apply to any InDesign object, and table styles and cell styles, which make document-wide changes to table and cell formatting quickly and painlessly.

However, note that character styles are handled differently in InDesign than in QuarkXPress. You can define a character style in InDesign to be as specific as you want. For example, your character style could be defined to apply only italic, ignoring any other formatting already applied to the text. You could then apply that same “italic” character style to text

set in different fonts and sizes, and it would always make it italic—except in the case where a font doesn’t have an italic style. (InDesign will never apply a “fake” italic to text.)

Note that in general you should not format an entire paragraph with a single character style. Instead, use a paragraph style, which applies both paragraph and character formatting to the selected text.

Character styles also allow for some of the most powerful text formatting features in InDesign, including nested styles, GREP styles, and drop cap styles. For more information, see “Nested Styles” on page 42.

Creating a new document

In both QuarkXPress and InDesign, choosing File > New > Document or pressing Command+N (Mac OS) or Ctrl+N (Windows) displays the New Document dialog box. The controls in these dialog boxes are similar, but not identical. Here are a few things you should know about creating a new InDesign document:

- Facing Pages: If you're creating a book or magazine with a left and right (verso and recto) page format, select this option.
- Master Text Frame: This is similar to the Automatic Text Box option in QuarkXPress. While this feature is not as important in InDesign as it is in QuarkXPress, it is useful if you will be using the Smart Text Reflow feature, which can add or delete pages as you type or edit text on your InDesign pages.
- The maximum size of an InDesign page is 216 x 216 inches (that's an 18-foot or 548-cm square) compared to 48 x 48 inches in QuarkXPress.
- The Page Size menu lists common screen resolution sizes—helpful when creating documents that will be exported to PDF or SWF to be viewed onscreen. For all intents and purposes, points and pixels are equivalent measures.
- The Intent menu should match the document's final destination: Choose Print to create a document with CMYK swatches and transparency blend mode. Choose Web for onscreen, interactive documents, because it sets your color swatches and transparency blend mode to RGB and your measurements to pixels.
- If you later change your mind about the final page size, you can choose File > Document Setup. This also lets you convert a facing-page document into a single-sided document, or vice versa.
- You can change a document's margin and column settings by choosing Layout > Margins And Columns. While QuarkXPress lets you adjust margins and columns only on a master page, InDesign lets you change these settings for a master page or one or more individual document pages—depending on what you select in the Pages panel.
- If your document opens vertically (like a wall calendar) instead of horizontally, you can later rotate one or more spreads by selecting them in the Pages panel and choosing Rotate Spread View > 90° CW (or 90° CCW) from the Pages panel menu.
- Although you can create a single document with as many as 9,999 pages, you'll probably want to use the Book feature (File > New > Book) to manage your long documents. A book file is a collection of InDesign files. You can sequentially number pages in booked documents, and use the Synchronize feature to ensure the documents use the same styles, color swatches, and master pages.

You can modify any document preset, including the [Default] preset, by choosing File > Document Presets > Define.

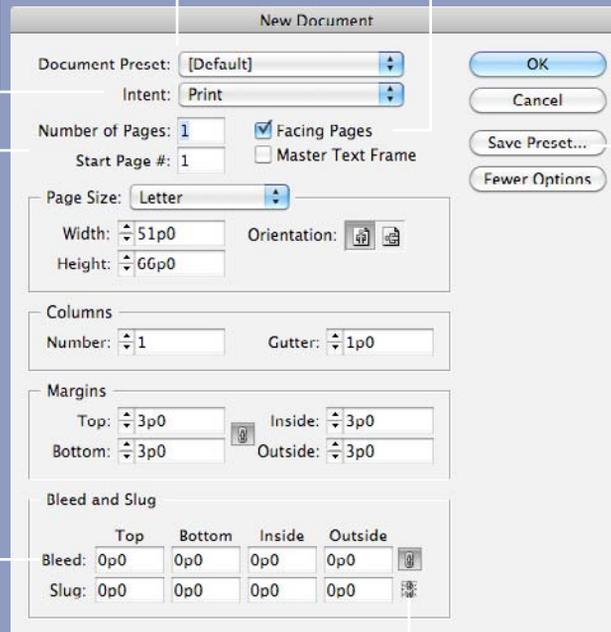
A new facing-pages document begins with a right-hand page. If you need to start the document with a left-hand page, set the Start Page # field to an even number.

If your document is destined for a CMYK output, such as a printing press, choose Print. For interactive documents, choose Web.

You can enter the number of pages and the starting page number for your new document, if you wish, but it is optional. You can always add or remove pages or change page numbers later in the Pages panel.

The More Options button displays controls for creating bleed and slug guides on the pasteboard.

The bleed area is for objects that you want to extend all the way to the trimline of the printed document; the slug area is for instructions to the printer, sign-off forms, or other information related to a document.



You can save any settings you choose in the New Document dialog box as presets. After you create a preset, it's displayed in the Document Preset menu in the New Document dialog box.

You can create a new document quickly based on the last chosen document preset by pressing Command+Option+N (Mac OS) or Ctrl+Alt+N (Windows).

When this link icon is selected, InDesign helps ensure that all the values in that section are the same.

Navigating documents

InDesign offers many of the same methods for document navigation you've become accustomed to in QuarkXPress. Even better, it includes several features that let you navigate more quickly to the page you want to display, zoom in more closely on the area you want to work on, and see more clearly the objects you want to modify.

Navigating around a page

Besides the scroll bars on the side and bottom of each document window, there are several ways to pan around a page, or even from one page to another:

- The Hand tool lets you adjust the visible portion of the page within the document window. You can temporarily access the Hand tool (and scroll the page) by pressing Option+spacebar (Mac OS) or Alt+spacebar (Windows).
- Holding down the mouse button with the Hand tool selected for about one second invokes the Power Zoom mode, zooming out to show you the current spread. The red rectangle indicates the area

you will see when you release the mouse button. Drag this rectangle to a different location or use the arrow keys on your keyboard (or scroll wheel) to change its size.

You can also zoom in and out by choosing one of the magnification commands in the View menu, using the Zoom tool, or specifying a percentage in the Zoom field in the Application Bar (if currently visible).

Navigating from page to page

Like QuarkXPress, InDesign provides a keyboard command—Command+J (Mac OS) or Ctrl+J (Windows)—that lets you quickly navigate to a particular page. When you use this keyboard shortcut, the Go To Page dialog box is displayed.

You can click a tab to navigate from one document to another. Drag the tab to separate it into its own window.

When in Power Zoom mode, the red rectangle shows the area that you'll see when you release the mouse button. Drag the rectangle to view a different area or page. Use the scroll wheel or the arrow keys on your keyboard to change zoom percentage.

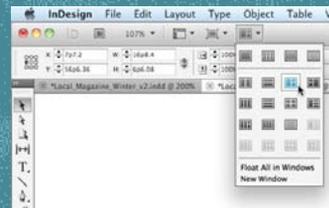
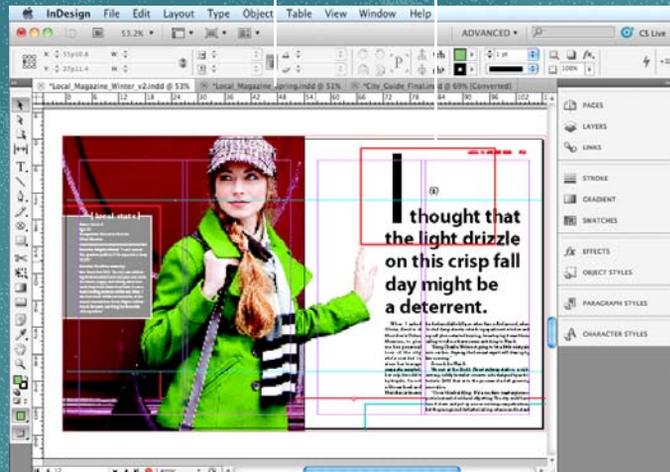
Type the page or master-page number you want to display, and then click OK or press Return or Enter.

You can also navigate to a different page by:

- Choosing or entering a page number in the page number field at the bottom of the document window.
- Clicking the First Page, Previous Page, Next Page, or Last Page arrows on either side of the page number field.
- Choosing any of the navigation commands in the Layout menu. For example, Go Back returns to the last page you viewed, much like the Back button in a web browser.
- Double-clicking page icons in the Pages panel (Window > Pages).
- Pressing Shift+Page Down to go to the next page or Shift+Page Up to go to the previous page. In a facing-pages document, you can instead press Option (Mac OS) or Alt (Windows) to navigate one spread at a time.

Navigating through windows

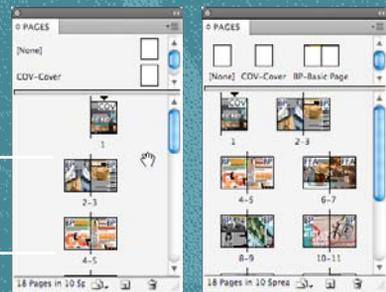
If you have more than one document window open, you can switch from one to another by choosing from the Window menu or by pressing Command+~ (Mac OS) or Ctrl+Tab (Windows).



The Arrange Documents widget in the Application Bar lets you quickly position multiple windows onscreen.

When the pointer is within the Pages panel, it changes into a grabber hand. You can use a mouse wheel, or click and drag, to scroll through the pages of a document.

To move to a particular page, double-click a page icon in the Pages panel (right). To navigate within a multipage document, use the controls at the bottom left of the document window (below).



The Pages panel can display pages vertically (above left) or horizontally (above right), which often allows you to see more pages in a smaller space. To change the view settings, choose Panel Options from the panel menu.



Importing text and graphics

InDesign supports import of all common formats for both text and graphics, including RTF, Microsoft Word, Microsoft Excel, TIFF, JPEG, PDF, EPS, Buzzword files from Acrobat.com, and even native Photoshop and Illustrator files (see “Using native file formats” on page 26). You can also import InDesign (INDD) files into InDesign layouts. If you are creating a “rich media” PDF file with InDesign, you can import QuickTime, AVI, MPEG, and SWF movie files, or AIFF, WAV, and AU sound clips. These file formats can be played when you export a document to Adobe PDF.

There are three basic methods for importing text and graphics into your InDesign document: Copy and Paste; choose File > Place; or drag and drop files from Adobe Bridge, the Mini Bridge panel (Window > Mini Bridge), the Mac OS Finder, or Windows Explorer into an open InDesign document.

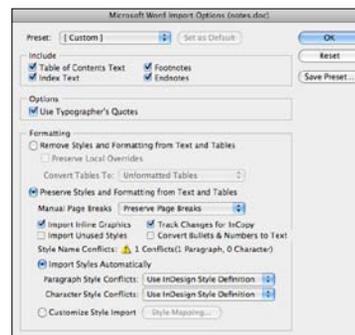
Importing text

Copying and pasting plain text into InDesign is a useful and quick import method, but formatting and special characters are often lost in the translation. Instead, importing a Microsoft Word or Rich Text Format (RTF) file using File > Place is often a better choice.

InDesign offers robust support for both Word and RTF files. When you import a Word document or an RTF document, you have the option to rename styles (in case of a naming conflict), overwrite an existing InDesign style with the Word or RTF style, or map a Word or RTF style to an existing InDesign style.

To access these style-mapping options, as well as several other options, choose File > Place, select a Word or RTF file, and then select Show Import Options in the Place dialog box. When you click Open, the Microsoft Word Import Options dialog box is displayed.

When you import text using the Place command, you can select Show Import Options in the Place dialog box to control how formatting is handled. InDesign provides many options for preserving and removing formatting.



Working with graphics and frames

Here's a quick overview of how to resize and crop images:

- To scale a frame and its contents, hold down Command (Mac OS) or Ctrl (Windows) while dragging a handle with the Selection tool. Add the Shift key to maintain the proportions as you resize.
- To scale to a specific width or height, replace the X or Y percentage value in the Control panel with a specific value.
- To crop an image inside a frame, click the frame with the Selection tool and drag one of its side or corner handles.
- To move an image inside its frame, use the Selection tool to drag the Content Grabber, or double-click the graphic to select it, and then drag the image.
- To fit a frame to its content, double-click a frame handle or press Command+Option+C (Mac OS) or Ctrl+Alt+C (Windows). This works for text frames, too.
- To scale an image to fit inside a frame, you can choose Fit Content Proportionally or Fill Frame Proportionally from the Object > Fitting menu.
- To specify default fitting options for a frame, use the controls in the Frame Fitting Options dialog box (Object > Fitting > Frame Fitting Options).



To change how an image is cropped, drag its circular Content Grabber. A ghosted image of the whole graphic appears when you drag (not shown here) to help you position the image properly.

If the styles in the Word or RTF file have names that do not match the styles in your InDesign document, you can use Customize Style Import to map them properly.

When you click OK, InDesign places the text into the currently selected text frame. If no frame was selected, InDesign loads the Place icon (📄):

- To flow text manually, move the loaded Place icon inside an existing frame, and then click. The text stops flowing at the bottom of the frame or the last of a series of threaded frames. You can also click an empty area to create a new text frame that's the size of the current page column. If you click and drag the loaded Place icon, you create a new frame the size of the rectangle.
- If the text frame is overset, you can click the out port with the Selection tool, and continue manually flowing text.
- To flow text semiautomatically, hold down Option (Mac OS) or Alt (Windows), and click a frame or empty area. Semiautoflow works like manual text flow, but the pointer becomes a loaded Place icon again after each click.
- To flow text automatically and generate new pages to hold all of the text, hold down the Shift key when you click.
- To flow text automatically but not generate new pages, hold down Shift+Option (Mac OS) or Shift+Alt (Windows).

Importing graphics

If you already have a frame selected on your document page, you can import a graphic into it by choosing File > Place. In the Place dialog box, select the graphic you want to import, select Replace Selected Item at the bottom of the Place dialog box, and then click Open.

If you have no frame selected on your page, or you deselect the Replace Selected Item option, when you click Open in the Place dialog box InDesign loads the Place icon (📄). Then you can:

- Click an empty area of the page or pasteboard to create a new frame the size of the graphic, or click and drag the loaded graphics icon to create a frame the size of the

rectangle you drag. InDesign automatically scales the image to fill that frame.

- Click an empty frame to place the image into it.

Note that if a text insertion point is blinking when you place a graphic, the graphic is automatically placed as an anchored object that flows with the surrounding text.

You can select multiple files in the Place dialog box—including a mix of graphics and text files—and then place the files, in whatever order you want, into existing frames or into new frames. Press the arrow keys on your keyboard to step through the files loaded in the cursor icon.

If you don't like the result after you place a graphic, you can undo the

action (Edit > Undo Place) to return to the loaded graphics icon. Then, either place the graphic again, press Esc to remove it from the Place icon, or click any tool in the Tools panel to clear the loaded icon entirely.

Alternatively, with more than one image loaded, you can press the arrow keys on your keyboard while you drag to place the images in a grid, similar to a contact sheet.

Copying graphics

In addition to importing native Illustrator files using the Place command, you can also drag and drop or copy and paste Illustrator vector artwork files into InDesign to work with them as editable objects. In this case, the artwork is no longer linked to the original Illustrator file. Some Illustrator features, such as gradient

mesh, are not supported in InDesign, so this technique should be reserved for relatively simple artwork.

When you copy and paste, or drag and drop objects from Illustrator, they're displayed in InDesign as a grouped collection of editable objects. If you want to work with the objects individually, select the group with the Selection tool, and then choose Object > Ungroup.

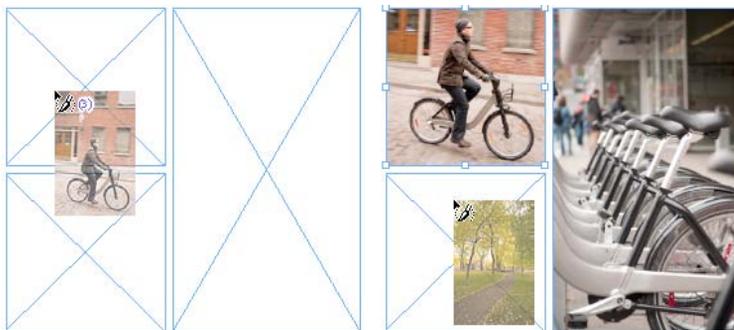
Note that for copy and paste to work, the Copy As AICB option must be selected in the Illustrator Preferences dialog box, and Prefer PDF When Pasting must be *deselected* in the InDesign Preferences.

You can also copy objects from InDesign and paste them into Adobe Illustrator. However, text may be converted into outlines when you paste into Illustrator.

Although you can copy and paste pixel images from Photoshop into InDesign, it is not recommended. It is a better practice to use the Place command instead.

Display quality

InDesign offers several options for displaying graphics onscreen. By default, vector and bitmap images are displayed using low-resolution previews. To see better quality versions of your pictures, choose



When you choose more than one image in the Place dialog box (or drag more than one image into InDesign), you can place them one at a time. Note that the cursor tells you how many images are queued up: first three (left) and then, after clicking twice, one more (right).

Links panel

View > Display Performance > High Quality Display. This may slow down screen redraw on your computer.

You can also increase the display quality of an individual graphic:

- Right-click (or Control-click with a one-button mouse in Mac OS) a graphic frame, and then choose Display Performance > High Quality Display.
- If you are importing an EPS file, select Show Import Options in the Place dialog box, and then choose Rasterize The PostScript to get a better quality preview.

Modifying placed graphics

To modify a placed graphic in its original application, hold down Option (Mac OS) or Alt (Windows), and double-click the graphics frame. (You can also select a graphic or its frame, and then choose Edit > Edit Original or click the Edit Original button  in the Links panel.)

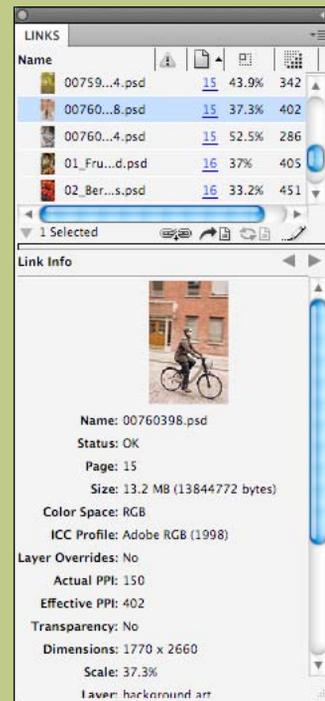
The Edit Original feature relies on the Mac or Windows operating system to know what application to launch. You can also choose an alternate application from the Edit With menu (in the Edit menu or Links panel menu).

After you make and save your changes, the placed artwork is automatically updated in InDesign.

You can use the Links panel to identify, select, monitor, and relink imported graphics files. The Links panel displays a list of all imported graphics and a variety of link attributes, including warning icons for graphics that have been modified or are missing.

Here are some other features in the Links panel that you should be aware of:

- You can reorder the files in the panel by clicking the name or icon at the top of the column. You can also change the order of the columns or change their width by dragging the column headers.
- Click the blue page number next to the filename to jump to that page and highlight the image.
- Click the triangle in the lower left corner of the panel to view the Link Info section, which offers more information about the selected graphic. For example, it can show bitmap image resolution, color space, current image scaling, and layer position.
- You can add or remove columns of information in the panel, or what information is displayed in Link Info, by choosing Panel Options from the panel menu.



You can customize the Links panel to show the information you want by choosing Panel Options from the panel menu. Here, a larger image thumbnail has been made visible in the File Info section, and the scale and resolution columns added to the list at the top.

The Links panel also lets you relink to a new file on disk, update modified links, reveal the file in Finder (Mac OS) or Explorer (Windows), copy the files to a new folder on disk (similar to Package, but for only selected files), and embed the placed file inside the InDesign document.

Using native file formats

The old QuarkXPress workflow required you to keep at least two versions of each graphic file: a layered, native Photoshop or Illustrator document as well as a flattened version, usually stored as a TIFF, JPEG, or EPS.

InDesign supports these formats, but also lets you import native versions. Using the native Photoshop (PSD) and Illustrator (AI) file formats may significantly reduce your file-management overhead, save disk space, and streamline your workflow.

For example, you can place PSD files directly into your InDesign layouts. After placing a Photoshop image into a layout, you can modify it within InDesign by cropping or scaling it, or by turning layers and layer comps on or off.

InDesign preserves transparency in Photoshop files, including soft edges. No matter what technique you use—paths, masks, or alpha channels—InDesign can read, display, and output the image.

InDesign even lets you place and separate PSD files that contain 3D artwork or spot colors, including duotone images.

You can also control the visibility of layers when you place PDF-compatible Illustrator (AI) files and layered PDF files.

Select Show Import Options when placing native files to control how the files are imported. For example, when importing an AI or PDF file, the Import Options dialog box lets you choose which pages or artboards to place, whether to crop the artwork or include its bleed area, which layers you want visible, and whether the background should be considered transparent or opaque.

When placing a native PSD file, the Import Options dialog box lets you choose which layers or layer comps to show, whether to apply an embedded clipping path, which ICC color profile to apply to the image, and even which channel to

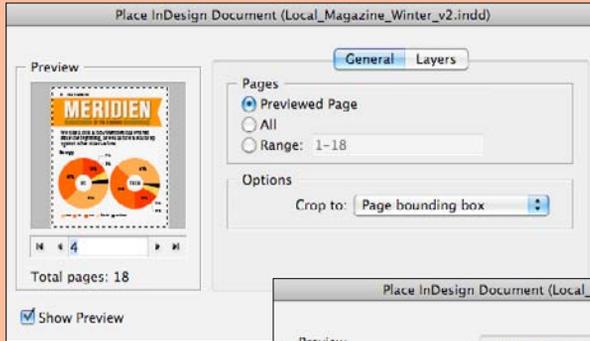
use as a transparency mask for the document.

If you've selected different layers or layer comps in placed PSD files in your layouts, be sure to let your printer know. Some printers flatten PSD files as part of their workflow, which would not give you the results you want. Of course, this is irrelevant if you are sending PDF files to your printer.

Tip:

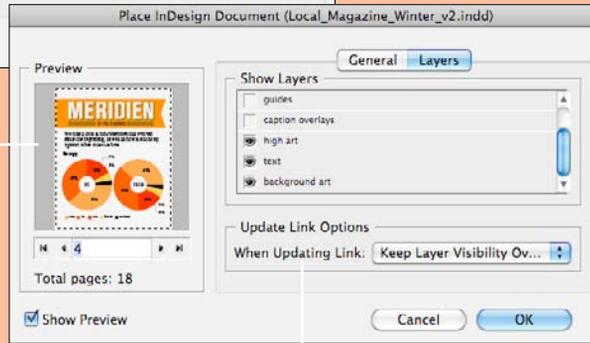
IMPORTING INDESIGN FILES

You can import native InDesign (INDD) documents into other InDesign files, eliminating the need for an intermediate PDF file. When you place an INDD file, InDesign treats it like a layered PDF document, so you can choose which page or pages to import, and you can turn on and off layers. When you package your document, all placed images and fonts in the original INDD file are also collected properly.



You can choose one or more pages from a PDF or InDesign document by selecting Show Import Options in the Place dialog box (File > Place). You can also choose one or more artboards in Illustrator CSS files that contain multiple artboards.

The preview image in the import options dialog box changes depending on the selected layer comp and the show/hide status of individual layers.



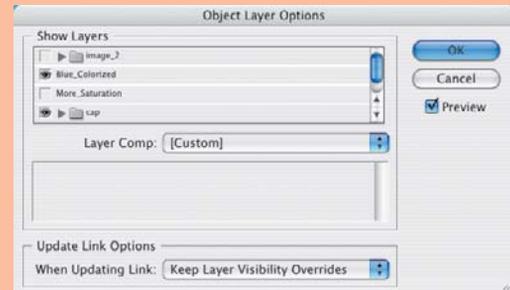
The import options dialog box also lets you adjust layer comp or layer visibility when importing a native Photoshop, Illustrator, InDesign, or PDF file.

The When Updating Link menu offers two options. Keep Layer Visibility Overrides will maintain any overrides you've made in InDesign if you edit the original file (unless the file's layer structure is significantly changed). Use Photoshop's Layer Visibility (or Use Document's Layer Visibility) will reset any overrides you've made in InDesign when the link is updated.

The Link Info area of the Links panel displays the Layer Overrides status when you have changed the layer visibility for a graphic.



You can adjust layer comp or layer visibility after you select a graphic by choosing Object > Object Layer Options, and then adjusting the settings in the Object Layer Options dialog box.



Working with tables

You can easily create sophisticated tables in InDesign—making your own from scratch, converting imported text into tables, or placing styled Word and Excel tables. Tables can flow across multiple pages for easy editing and automatically include headers and footers. Extensive formatting options, including alternating fill and stroke controls, enable you to fine-tune the final design of your tables, and you can create table styles and cell styles to quickly and consistently format tables and cells.

In InDesign, tables are always anchored in a text frame. To create a new table, select the Type tool, place the text cursor inside a frame or create a new text frame, and then choose **Table > Insert Table**.

The **Insert Table** dialog box lets you specify the number of rows and columns for your table. However, you can later make the table larger or smaller by placing the text cursor inside the table and using the options in the **Table** panel.

By default, the inserted table fills the width of the container text frame. If you make the frame smaller, the table remains visible outside the frame. Tables flow with surrounding text, just like anchored objects. Each cell

in an InDesign table is similar to a text frame of its own, into which you can place text, graphics, and other tables.

You can adjust each column width and row height in a table by dragging the dividers with the Type tool.

Converting text to tables

InDesign provides a number of ways to turn text into tables and tables into text. For example, you can import tab-delimited text files from a spreadsheet or database, select the text with the Type tool, and choose **Table > Convert Text To Table**.

Importing tables

You can import a table from a Microsoft Word or Excel document like any other text file. Select **Show**

Import Options as you import the data to fine-tune the imported data.

If you copy tabular data from Word or Excel, you can paste it into an InDesign table by placing the text cursor in the upper leftmost cell you want to populate, and then pressing **Esc** (to select the cell itself) and choosing **Edit > Paste**.

Threading tables

Because tables are anchored in text, InDesign lets you thread them across multiple text frames, making it easy to work with lengthy tabular information. You can set up running header and footer rows that appear at the top or bottom of the table on each page. To convert a normal row to a header row, select it with the

Flexible, powerful tables

To create a table in InDesign, choose **Table > Insert Table** with your text cursor in a text frame. Alternatively, you can import a formatted table or start with raw data.

Type tool, and then choose **Table > Convert Rows > To Header**.

Formatting tables

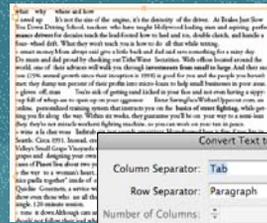
InDesign offers extensive formatting controls for tables. You can apply alternating fills or strokes by choosing **Table > Table Options > Table Setup**. You can specify cell inset values, alignment, text rotation, row height, column width, and keep options by choosing **Table > Cell Options > Text**.

You can also format a cell, row, or column by selecting it with the Type tool and then using the Control, Stroke, Swatches, or Table panel.

InDesign makes it easy to add and delete rows and columns and to merge, unmerge, and split cells. You can find all these commands in the Table menu.

Table and cell styles

Creating table and cell styles is similar to creating paragraph and character styles. When you edit a table style or cell style, all tables or cells that have been formatted using that style are automatically updated when you save your changes. You can create table and cell styles by opening the Cell Styles and Table Styles panels from the **Window > Type & Tables** menu.



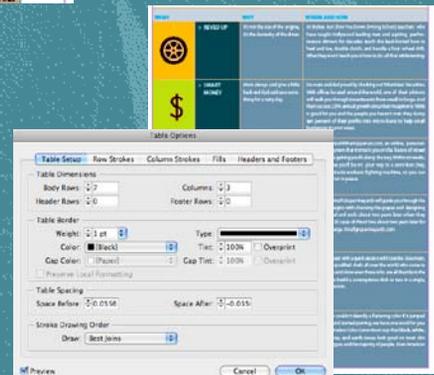
You can easily convert this tab-delimited text into a table by choosing **Table > Convert Text To Table**.

To adjust a column's width, drag the divider with the Type tool. To move a column without altering the overall table width, hold down the Shift key while dragging.

	where and how
size of the dexter-river.	At Brakes Just Slow You Down Driving School, teachers who have taught Hollywood leading men and aspiring performance drivers for decades teach the lead-footed how

To format a row at a time, select all its cells by clicking along its left edge with the Type tool (or select a column by clicking along its top edge). You can then change all the selected cells at once using the Swatches, Stroke, Control, or Table panel.

To apply alternating tints and other table-wide formatting options, place the text cursor inside the table and choose **Table > Table Options > Table Setup**.



After you have formatted one table, you can save your table and cell formats in the Table Styles and Cell Styles panels.

Using creative effects

InDesign includes transparency features that let you create eye-catching, see-through effects that can be applied independently to an object's fill, stroke, or content. These features include opacity, blending modes, and nondestructive Photoshop based effects to help you get exactly the results you want—as you design in real time with live preview.

The Blending Mode and Opacity controls are in the Effects panel (Window > Effects), while all the other Photoshop effects are listed under the *fx* icon in the Effects panel or Control panel and in the Object menu (Object > Effects). Choosing an effect opens the Effects dialog box.

You can apply transparency effects to any object, including text frames, placed graphics, and shapes that you create within InDesign.

Here's a list of the available effects and a description of the results they produce:

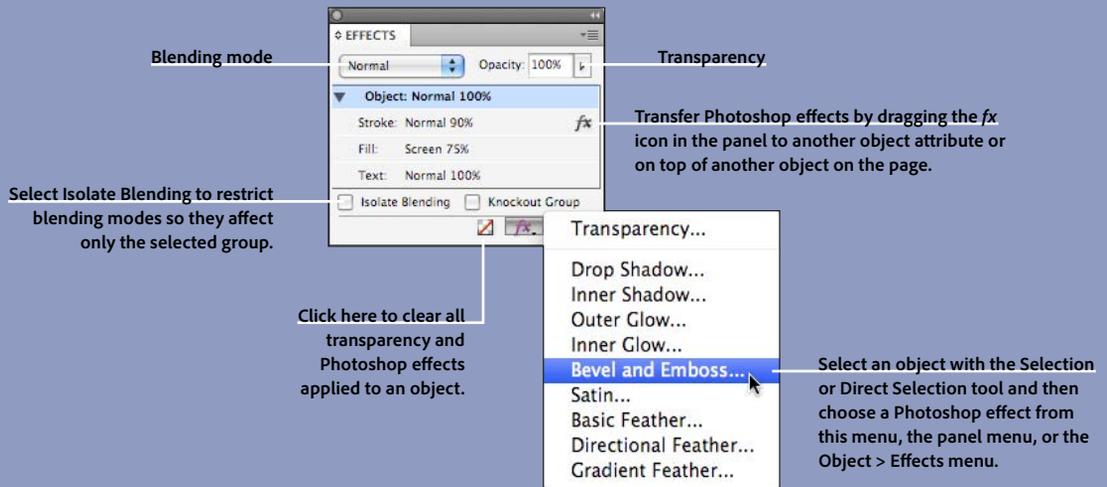
- **Blending Mode menu (Effects panel):** Provides 16 options for changing the appearance of areas where the selected object or group overlaps underlying objects.

The blending mode options in InDesign are similar to those in Photoshop and identical to those in Illustrator.

- **Opacity field:** Allows you to vary the degree of transparency of the selected object or group from 100% (completely opaque) to 0% (completely transparent). When you decrease an object's opacity, the object becomes lighter, and the underlying artwork becomes visible through the object.
- **Drop Shadow:** Adds a soft- or hard-edged shadow behind any object. You can control the position of a drop shadow and vary the blending mode, opacity, size, spread, noise, and color of the drop shadow. The Use Global Light option lets you use the same

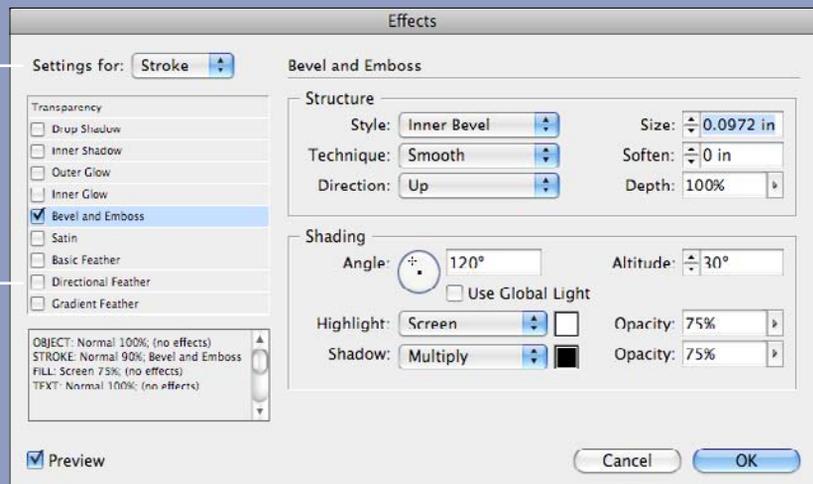
position settings for all drop shadows in a document.

- **Inner Shadow:** Adds a shadow that falls just inside the edges of the object's content, giving the object a recessed appearance.
- **Outer Glow and Inner Glow:** Add glows that emanate from the outside and inside edges of an object.
- **Bevel And Emboss:** Adds inner highlights and shadows that create a 3D relief effect.
- **Satin:** Adds interior shading that creates a satin-like finish.
- **Basic Feather, Directional Feather, and Gradient Feather:** Soften (or “mask”) the outer edges of an object by fading from opaque to transparent.



You can apply effects independently to a group, an object, its stroke, its fill, or to the text in text frames.

You can easily apply multiple effects at once using the Effects dialog box.



Tips:

WORKING WITH TRANSPARENCY

- Note that if you apply settings in the Effects dialog box without first selecting an object, each object you draw subsequently will have those new settings applied.
- To apply an effect to an image separately from its frame, first select it with the Direct Selection tool. While you cannot apply transparency effects to text selected with the Type tool, you can convert the text to outlines (Type > Create Outlines) and then apply the effect with the Selection tool.
- To learn more about transparency, visit www.adobe.com/print.

Flattening transparency

When you print an InDesign file that contains transparent objects, InDesign performs a process called *flattening*, which converts all areas of transparency into a collection of opaque vector and raster objects that retains the appearance of the original objects. Flattening also occurs when you export a PDF file with Adobe Acrobat® 4 compatibility (such as a PDF/X-1a or PDF/X-3 file) or an EPS file, using File > Export.

You can choose the flattening quality in the Transparency Flattener area of the Advanced pane of the Print dialog box or the Export Adobe PDF dialog box. By default, the Preset menu includes three options: Low Resolution, Medium Resolution, and High Resolution. In general, Medium Resolution is appropriate for proofing, and High Resolution should be used for all final output.

If you're printing to a device that does not support Adobe PostScript®, or creating a PDF file that you will send to a client as a proof, you should check Simulate Overprint in the Output pane of the Print dialog box. This way, the proof will look the same as it looks onscreen with Overprint

Preview (View > Overprint Preview) enabled. This is especially important when using spot colors.

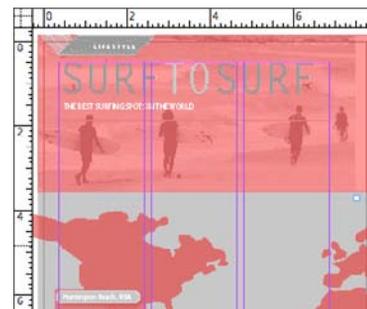
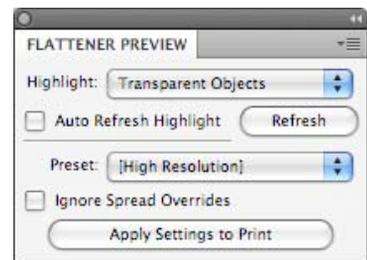
If none of the default presets meets the requirements of your printer—or your output provider's printer—you can create custom flattener presets by choosing Edit > Transparency Flattener Presets and then clicking New in the Transparency Flattener Presets dialog box. For information about creating flattener presets, refer to InDesign Help.

Note that flattening is not necessary when creating a PDF/X-4 file and printing to an Adobe PDF Print Engine RIP.

Managing transparency

In a document that will be flattened, it is a good practice to place text on a higher layer than transparent objects. This removes the chance that some text characters will become outlined in the flattening process.

The Flattener Preview panel (Window > Output > Flattener Preview) helps designers and printers prevent mistakes and helps ensure high-quality printed results by identifying transparent objects or objects that interact with transparent objects.

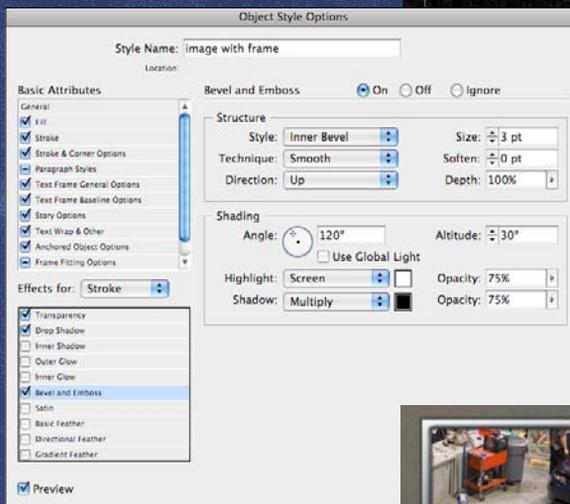


The Highlight menu in the Flattener Preview panel provides several options for displaying specific instances of transparency, including Transparent Objects, All Affected Objects, and Outlined Text. For example, the Transparent Objects option highlights in red all transparent objects.

Adding creative effects to object styles

When you expect to apply the same object formatting more than once in a document, consider making an object style in the Object Styles panel. This lets you quickly apply and redefine your formatting. Your object style definition can include transparency effects applied to the object, its fill, its stroke, or (in the case of a text frame) its contents.

In this original layout, the images and the text don't stand out enough over the dark background.



Here, the graphic frames are given a beveled stroke with a small shadow to add dimensionality.



In the final layout, the Fill of the text frame is set to Paper, at 70% opacity. The text frame object itself is also given an angled Gradient Feather and a Pillow Emboss effect.

Preflight and proofing

InDesign offers an array of options for outputting your projects, whether you plan to print your InDesign file or distribute it on the web, consumer electronic devices, or phones. However, before you export or print your document, use the InDesign preflight and proofing tools to help ensure the final result will appear as you expect.

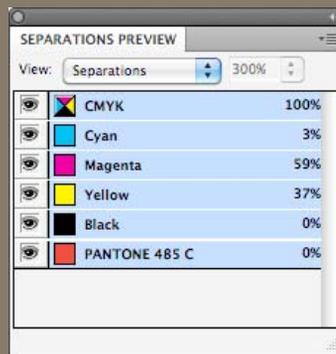
To see an accurate view of what document pages will look like when printed or exported as PDF, choose View > Screen Mode > Preview (or press W when not editing text). This hides nonprinting page elements such as guides, the pasteboard, and frame edges.

You can hide the InDesign user interface entirely, including menus and panels, by choosing View > Screen Mode > Presentation (or pressing Shift+W). This is a helpful display mode when showing a client or colleague your work.

If you choose View > Overprint Preview, InDesign displays an onscreen “ink preview” that

approximates how gradients, transparency, and overprinting will appear in color-separated output.

The Separations Preview panel (Window > Output > Separations Preview) lets you visually check individual or multiple plates, preview overprinting objects, and view ink-limit warnings onscreen before printing.



When you open the Separations panel and choose View > Overprint Preview, InDesign displays a real-time ink reading of the area beneath your cursor. Click the visibility icons in the left column to hide or show individual color plates.

The Preflight panel (Window > Output > Preflight) can warn you of problems that may prevent a document or book from printing correctly. Preflighting is “live”—that is, when it is enabled, InDesign checks your document while you work, and displays a green or red dot in both the lower left corner of the panel and the document window.

You can control what the Preflight panel considers an error by choosing Define Profiles from the Preflight panel menu. Options include minimum image resolution, color model limitations, document size, and more. After creating a new preflight profile, you can choose it from the Profile menu in the Preflight panel.

Note that when you select an error, the Info area at the bottom of the panel provides more details.

If you are including interactive elements in your document, such as animations, you can see them in action inside the Preview panel (Window > Interactive > Preview).

You can choose your profile here.

You can double-click to jump to this object.

This area identifies the problem and recommends a solution.

When a document has no errors, the "light" turns green.

Problem: Color images must be at least 200 dpi
Effective Resolution: 119 dpi
Fix: Direct-select the image and use the Object > Transform > Scale command to change the scaling applied. Or edit the source file to correct the resolution problem.

32 errors Pages: All 1-9

You can choose Define Profiles from the Preflight panel menu to tell InDesign what "errors" to look for.

Preflight Profiles

Profile Name: Check Magazine

General

- LINKS
- COLOR
- IMAGES and OBJECTS
- TEXT
 - Overset Text
 - Paragraph Style and Character Style Overrides
 - Font Missing
 - Glyph Missing
 - Dynamic Spelling Detects Errors
 - Font Types Not Allowed
 - Non-Proportional Type Scaling
 - Minimum Type Size

Embedded: Basic Copy

Save Cancel OK

The Preflight Profile menu lets you export or import profiles.

You can create a new Preflight Profile here.

Important techniques

The previous sections have helped you learn your way around Adobe InDesign CS5. Now it's time for some techniques that will get you laying out pages faster and better than ever before. Whether you need to create colors and gradients, format text automatically, anchor an object inside a text flow, or just find some tips for getting more efficient with InDesign, you'll find the answers in this section.

Selection tool techniques

The Selection tool and the Direct Selection tool are two of the most important tools in InDesign, so it's helpful to know how to access them quickly. Here are some tips:

- You can temporarily access the Selection tool or Direct Selection tool (whichever was most recently selected) by pressing Command (Mac OS) or Ctrl (Windows) when any other tool is selected.
- When editing text with the Type tool, you can switch to the Selection tool by pressing the Esc key.
- You can double-click a text frame with the Selection tool or the Direct Selection tool to switch to the Type tool. If the text frame contains text, the blinking text insertion point is displayed where you double-click.
- Double-click a graphic frame with the Selection tool to select the graphic inside the frame. Double-click again to reselect the frame.
- You can select “through” an object—selecting a frame or path behind another object—by holding down Command (Mac OS) or Ctrl (Windows) while clicking with the Selection tool.
- If you choose the Selection tool and then click any object that's part of a group, the entire group is selected. To select an individual object that's part of a group, double-click the object with the Selection tool. Then press Esc to select the group again.

Deselect All

Press Shift+Command+A (Mac OS) or Shift+Ctrl+A (Windows) to deselect all objects or text on a spread. It is particularly helpful to do this before creating or editing color swatches or editing a paragraph or character style, so that the swatch or style is not accidentally applied to the selected text or object.

Smart Guides

Smart Guides are temporary guides that appear as you create, move, rotate, resize, or scale an object or group of objects on your page. They help you lay out objects on a page quickly, without having to create guides and grids manually.

You can turn Smart Guides on or off in the View > Grids & Guides menu, or by pressing Command+U (Mac OS) or Ctrl+U (Windows).

For example, if you want two objects to align along their left sides, you can

enable Smart Guides, and then start dragging one of the objects with the Selection tool. When the sides or center points of the two objects are aligned, InDesign displays a light green guideline.

If you drag a third object near the first two, you will see a different kind of Smart Guide—one with arrows on each end—when the space between all three objects matches exactly.

If you rotate an object with the Rotate tool, InDesign shows the current angle next to the cursor, and displays a green Smart Guide when the rotation matches the same angle as any other rotated object visible on the page.

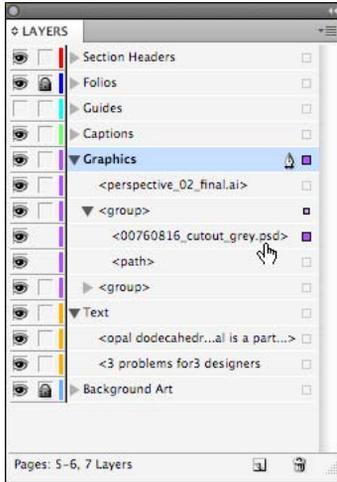
Note that the Smart Guides feature “sees” only the objects that you can see at your current view. If you want Smart Guides to ignore an object, scroll the page so that you cannot see it, or place it on a hidden layer.

Gap tool

The Gap tool lets you adjust the space between objects. When you place the Gap tool cursor between two objects—or between an object and the side of the page—a light gray zone indicates which objects will be affected. By default, the Gap tool affects all objects with commonly aligned edges at the same time. Hold down the Shift key to limit the affected objects to those on either side of the cursor.

When you drag the Gap tool, the affected objects resize so that the space remains fixed. Hold down the Command (Mac OS) or Ctrl (Windows) key while dragging to resize both the space and the objects.

If you hold down Option (Mac OS) or Alt (Windows) while dragging, InDesign moves all affected objects instead of resizing them.



The Layers panel lets you manage objects in complex documents.

Working with layers

Each object sits on a layer inside your document. By default, every file has one layer, but you can add more layers in the Layers panel (Window > Layers). For example, in a complex publication, you may want four separate layers for images, text frames, background artwork, and interactive elements. To create a new layer, choose New Layer from the Layers panel menu.

When you select an object with the Selection tool, a square selection icon appears highlighted on the far right of the object's current layer in the Layers panel. Drag the icon to move the selected object to a different layer.

When you click the triangle next to the layer name, the Layers panel reveals a list of all objects on that layer. To move an object—for

example, to position it above or below other objects on the same layer, or to move it to a different layer—drag it up or down within the Layers panel. This technique also lets you move objects in or out of groups.

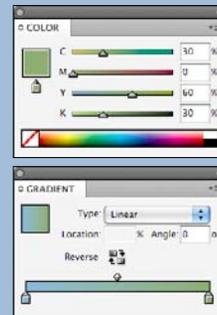
Clicking in the two columns along the left side of the Layers panel lets you hide/show or lock/unlock each object or layer. Double-click a layer to see more layer options.

New color swatches

By default, the Swatches panel contains color swatches for the four process colors, plus process-color equivalents of red, green, and blue. To add a new color swatch, choose New Color Swatch from the panel menu, and then choose Process or Spot from the Color Type pop-up menu. You can choose preset libraries of colors, such as Pantone® Solid Coated, from the Color Mode pop-up menu.

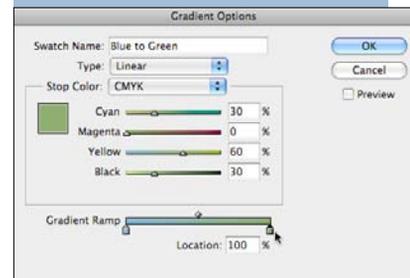
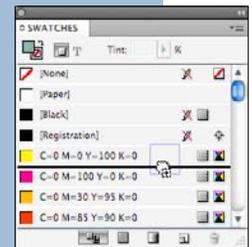
You can also create unnamed colors with the Color panel. You can then add those colors to the Swatches from the Color panel menu or Add Unnamed Colors from the Swatches panel menu.

Adobe Kuler™ is a web-hosted application for generating color themes. You can download color swatches as well as create and edit your own



You can use the Gradient and Color panels to define a two-color gradient.

To add the gradient to the Swatches panel, choose New Gradient Swatch from the Swatches panel menu, or drag the swatch icon from the Gradient panel into the Swatches panel (shown here).



Double-clicking the swatch in the Swatches panel opens the Gradient Options dialog box, where you can name or edit the swatch.

color themes using the Kuler panel (Window > Extensions > Kuler).

Creating and applying gradients

There are several ways to define and apply a gradient from one color to another. You can apply a gradient to any selected object by opening the Gradient panel (Window > Color > Gradient) and clicking the gradient swatch icon. Then you can choose Linear or Radial from the Type pop-up menu, adjust its angle, or reverse the gradient direction.

To change the colors, click the gradient stops under the gradient bar, and choose a color in the Color panel. Alternatively, you can hold down Option (Mac OS) or Alt (Windows) and click a named color in the Swatches panel. To add new gradient stops, click a blank area below the gradient bar.

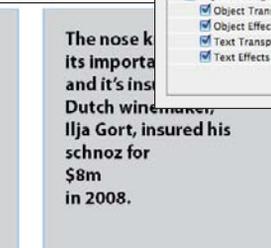
You can add the current gradient to the Swatches panel (or create a new named gradient) by choosing New Gradient Swatch from the Swatches panel menu. Named gradients do not include information about blend angle or location.

The Gradient Swatch tool lets you specify the start point, end point, and angle of a gradient. You can apply a gradient to the fill or stroke of any selected object or text.

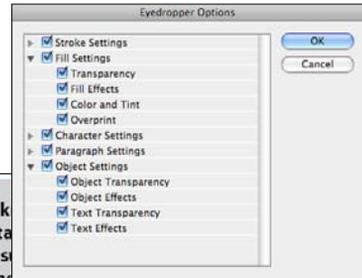
1. Double-click the Eyedropper tool to tell InDesign what formatting you want to copy.



2. Click an object or text to "pick up" its formatting. If you change your mind, you can pick up different formatting by Option-clicking (Mac OS) or Alt-clicking (Windows).



3. Click an object or drag over text to apply the formatting that was loaded in the Eyedropper tool.



Note that you cannot specify an opacity for a gradient stop. To create a gradient that changes from opaque to transparent, use the Gradient Feather tool or one of the Feather features in the Effects panel.

Copying formatting

The Eyedropper tool lets you copy character, paragraph, fill, stroke, and transparency attributes from any object, including an imported graphic. Double-clicking the

Eyedropper tool displays the Eyedropper Options dialog box, which lets you specify the attributes the Eyedropper tool copies.

For example, you can set the current fill color by selecting the Fill icon in the Tools, Swatches, or Color panel and clicking a bitmap image with the Eyedropper tool. You can then save that color to the Swatches panel by choosing Add To Swatches from the Color panel menu. If you click a

vector graphic with the Eyedropper tool, InDesign reads the RGB color from the screen preview.

To transfer text formatting from one range of text to another, select the Eyedropper tool, click the source text with the attributes you want to transfer, and then click within a target paragraph, or drag the loaded Eyedropper icon over a range of text.

Converting RGB and spot colors to process colors

When working with spot colors, it's a good idea to choose Ink Manager from the Swatches panel menu and then select the Use Standard Lab Values For Spots option. This helps ensure you get the best quality color for proofing and for conversion to CMYK. The Ink Manager also lets you convert a spot color to a process color by clicking the spot color icon  to the left of the spot color name or by selecting the All Spots To Process option.

To convert RGB colors or images to CMYK when you print, choose Composite CMYK, Separations, or In-RIP Separations from the Color pop-up menu in the Output pane of the Print dialog box.

You can convert to CMYK while exporting a PDF file by choosing Convert To Destination (Preserve

Numbers) from the Color Conversion pop-up menu in the Output pane of the Export Adobe PDF dialog box. Preserve Numbers indicates that images and swatches already defined with CMYK values will “pass through” and not be changed.

Drawing Bezier paths

While Adobe Illustrator is the industry's premier drawing application, InDesign offers many excellent drawing features that work identically to those in Illustrator, including a Pen tool and a Convert Direction Point tool. Note that when the Pen tool is over a path, it automatically changes to the Add Anchor Point tool; when it's over an anchor point, it changes to the Delete Anchor Point tool.

The Pathfinder panel (Window > Object & Layout > Pathfinder) lets you merge and intersect paths. The Object > Paths menu lets you combine paths into compound paths.

You can also copy and paste editable vector artwork between InDesign and Illustrator (see “Copying graphics” on page 24).

Redrawing frames with the Pencil tool

The Pencil tool lets you draw paths or frames free-form, by clicking and dragging. To create a closed path, hold down Option (Mac OS) or Alt (Windows) after you start drawing,

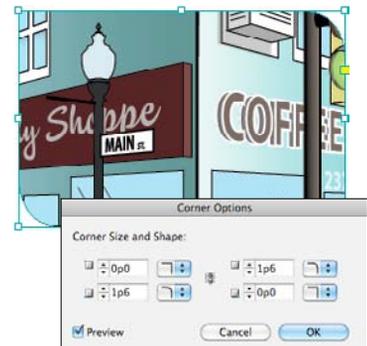
and keep holding it down until you have released the mouse button.

The Pencil tool not only draws, it *redraws*: If you draw over part of a path or frame edge, InDesign deletes a section of the path and redraws using the new path you drew. This is helpful for converting rectangular frames into irregular shapes.

To change the Pencil tool's tolerance settings, double-click the tool in the Tools panel.

Corner effects

You can make corners on any selected frame or path appear rounded (or one of several other corner effects) by choosing Object > Corner Options or selecting from the Corner Options pop-up menu  in the Control panel.



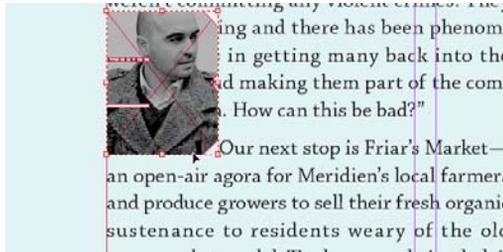
You can apply a different corner effect to each corner of a rectangular frame.

When working with rectangular frames, you can also change corner options by clicking the square yellow icon  that appears near the upper right corner of the selected frame. Then drag one of the diamond-shaped yellow icons  on a corner to create rounded corners. Hold down Shift while dragging to change just that corner. Hold down both Shift and Option (Mac OS) or Shift and Alt (Windows) to change the corner type on a single corner.

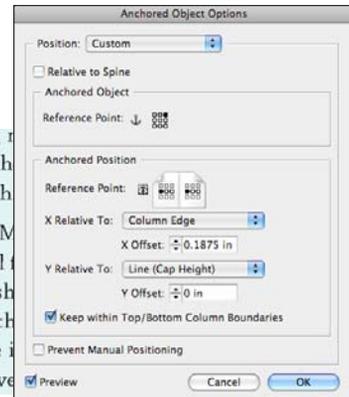
Anchoring objects into text

When you copy a path, frame, or group with the Selection tool and then paste it into text with the Type tool, it's called an *anchored object*. It behaves like a single text character that moves with the adjoining text as you make edits to the text. You can also create an anchored object by inserting the text cursor in text and choosing File > Place or Object > Anchored Object > Insert.

You can adjust the anchored object's position by choosing Object > Anchored Object > Options. From the Position pop-up menu, choose either Inline or Above Line to place the anchored object within the text frame. Choose Custom to place the object inside or outside the frame.



Select a frame with the Selection tool and paste it into a story with the Type tool to create an inline object.



The Anchored Object Options dialog box lets you precisely adjust the position of an anchored object—whether it is inside or outside a text frame.

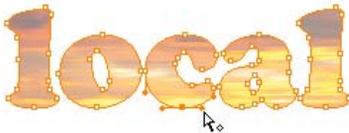
When Prevent Manual Positioning is selected in the Anchored Object Options dialog box, you cannot drag an anchored object with the Selection tool. When this option isn't selected, you can move an Inline or an Above Line anchored object vertically but not horizontally. However, you can drag a Custom anchored object in any direction.

Use the Text Wrap panel options to control how text wraps around anchored objects. However, note that text wrap affects only the lines in a story *after* the one in which the object is anchored.

Converting text to outlines

You can convert text to outlines by selecting it with the Type tool and choosing Type > Create Outlines. The original text is replaced with a group of paths anchored in the text. If you hold down Option (Mac OS) or Alt (Windows) when selecting Create Outlines, the original text is preserved and the path group is not anchored.

You can also select one or more text frames with the Selection or Direct Selection tool and choose Create Outlines. This converts all the text in the frames, replacing the original



Converting text (top) to outlines (bottom) creates compound Bezier paths that can be manipulated or filled with an image.

frames. Hold down Option (Mac OS) or Alt (Windows) to create a copy, leaving the original frames.

When you convert text to outlines, some formatting may be lost, such as paragraph rules, underscores, and strikethroughs. Therefore, it is not a good practice to convert large amounts of text to outlines in your document. If you are sending a file to an output provider who does not have the necessary fonts, it is better to send them a PDF file, which embeds the necessary character outlines for printing.

Quick Apply

The Quick Apply feature lets you quickly find and apply character, paragraph, table, and object styles. It also allows you to choose features, such as menu commands and scripts, all while keeping your hands on the keyboard.

To open the Quick Apply panel, press Command+Return (Mac OS) or Ctrl+Enter (Windows). When the panel is displayed, type a few letters of a style or menu item name to select it, and then press Return or Enter to apply it and close the panel. The letters do not need to be at the beginning of the name. For example, if you have a paragraph style named “Heading 1,” you can select it in the Quick Apply panel by typing “h1.”

You can control which features Quick Apply will list from the ▾ menu in the Quick Apply panel.

Nested Styles

InDesign offers several methods for automatically applying different text styles to different parts of a paragraph. For example, you can apply unique formatting to a drop cap character by first creating a character style with the desired font, color, and so on. Then choose Drop Caps And Nested Styles from the Control panel menu, and select the new character style from the Drop Cap section.

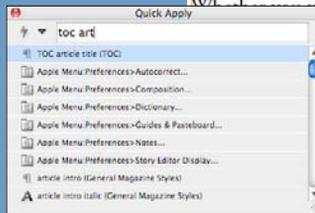
The Drop Caps And Nested Styles dialog box (or, if you’re editing a paragraph style, the Drop Caps And Nested Styles pane of the Paragraph Style Options dialog box) lets you apply nested styles and line styles with even more control.

A nested style is a character style applied to a specified range of text inside the paragraph. For example, you can apply one character style to the first word of the paragraph, and another character style up to the first colon (:) character.

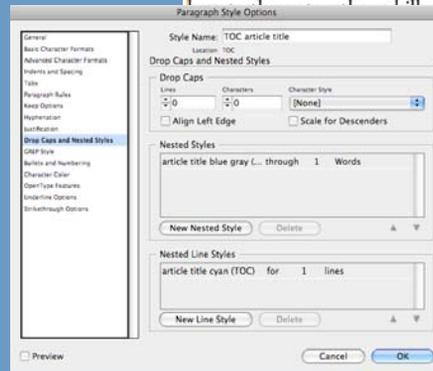
To create a nested style, you first create one or more character styles. Then, in the Drop Caps And Nested Styles pane of the Paragraph Styles Options dialog box, click New Nested Style. In the Nested Styles area, select a character style from the pop-up menu, and then click the area to the right of the character style, and choose Through or Up To. Choosing Through includes the character you specify in the rightmost column; choosing Up To formats only the text that precedes this character. Click in the rightmost column to type a character or view a pop-up menu of options. This setting determines where the character formatting ends.

Below the Nested Styles section of the pane or dialog box, you can specify line styles, which let you apply character styles to specific lines in a paragraph. For example, you might create a character style that applies Small Caps formatting, and then use the Line Styles section to

To format the first paragraph of this story, place the text cursor in it and open Quick Apply. Type a few letters in the style name, and then press Return or Enter.



The paragraph style specifies the font and uppercase format. The nested line style applies bright blue to the first line. The nested style applies the darker blue to the first "word" (in this case, the number 17).



apply that character style to the first line of the paragraph.

Working with GREP

GREP is a set of codes that lets you define a text pattern—for instance, all words that begin with “a” and end with “e.” You can use GREP to search for and replace text based on patterns by choosing Edit > Find/Change and then clicking the GREP tab of the Find/Change dialog box. InDesign Help lists all the GREP codes; alternatively, you can choose from the options in the Special Characters For Search  menu in the dialog box.

If you want to save a Find/Change query, you can click the Save Query

button, and then later recall it from the Query pop-up menu.

InDesign can also apply text styles to text inside a paragraph based on GREP patterns. You could use this feature, for example, to change the font or color of any text inside brackets in the paragraph.

To create a GREP style, choose GREP Styles from the Control panel menu (or the GREP Style pane of the Paragraph Style Options dialog box, when you’re defining a paragraph style). Then click New GREP Style, choose a character style from the Apply Style pop-up menu (if you haven’t defined a character style yet,

you can choose New Character Style from the pop-up menu), and type the GREP code into the To Text field.

Bullets and numbering

You can add bullets or sequential numbering to selected paragraphs by clicking the Paragraph Formatting Controls icon  in the Control panel and then clicking either the Bulleted List () or Numbered List () icon. To control formatting, styles, or positioning of the bullets or numbers, choose Bullets And Numbering from the Control panel menu.

You can apply automatic bullets or numbers as part of a paragraph style by choosing the Bullets And

Numbering pane of the Paragraph Style Options dialog box.

For more on bullets and numbering, including how to make multilevel lists and numbered lists across multiple nonthreaded text frames, see InDesign Help.

Placing text on a path

InDesign lets you place text along any path—even along the edge of a closed frame. After creating a path or frame, select the Type On A Path tool, which is paired with the Type tool in the Tools panel. Move the pointer over any position on the path, and then click when the plus sign (+) appears. If you drag the pointer along the path, text flows along only the part of the path on which you dragged.

If you switch to the Selection tool, three bracket lines are displayed on the type path—one at each end and a shorter one at the midpoint. Drag these bracket lines to adjust the placement of type along the path. You will also see the in and out ports of the path, indicating that you can thread text to or from another path or another frame.

Choose Type > Type On A Path > Options to display the Path Type Options dialog box, which lets you control the placement of the type relative to the path.

Story Editor

InDesign provides the Story Editor (Edit > Edit In Story Editor), which offers built-in word processing support. The Story Editor is especially useful for working with small text, overset text, tables, and long stories that span several pages. You can view changes in the layout as you make them in the Story Editor.

You can customize how the Story Editor displays text by adjusting the settings in the Story Editor Display pane of the Preferences dialog box.

Note that if you use the keyboard shortcut Command+Y (Mac OS) or Ctrl+Y (Windows), InDesign toggles between the document window and the Story Editor window, matching the cursor position between the two windows.

Adding notes to text

You can add a note to any text story by placing the text cursor in the position you want the note, opening the Notes panel (Window > Editorial > Notes), and clicking the New Note button in the panel. You can also convert any text to a note by selecting it and choosing Type > Notes > Convert To Note.

Notes are helpful when working with others in an editorial workgroup. You can see notes in the Story Editor or the Notes panel. They also appear

in the document window as a small hourglass icon —move the cursor over the icon to see the note.

Anywhere you can type text, you can insert a note, including in a table. Notes can also be seen and created in Adobe InCopy (see “Supercharging your workflow” on page 54).

Creating conditional text

When you are creating two or more projects where most of the content is similar, it can be cumbersome to create, maintain, and store multiple files. Instead, you can create a single document that contains two or three different versions. You use the Conditional Text panel to hide and show text for the areas that are different.

For example, you can create a catalog with three different prices for each item, and assign each price a unique condition using the Conditional Text panel (Window > Type & Tables > Conditional Text). To print the catalog with the first set of prices, you would hide the other two conditions in the Conditional Text panel.

Once you create a condition in the Conditional Text panel, you can select any text and click the condition in the panel to assign it.

To assign a condition to an image or other nontext object, first make it an inline or anchored object.

Cross-references

One of the most time-consuming aspects of laying out a long document—whether a book, a catalog, or a magazine—has traditionally been managing the cross-references. For example, if the text says “See Figure 15-3 on page 36,” you would need to update the cross-reference if the figure or page number changes.

Fortunately, you can quickly create and update cross-references with the Cross-References panel (Window > Type & Tables > Cross-References).

To insert a cross-reference (sometimes called an “x-ref”) at the current text cursor position, click the New

Cross-Reference button  in the Cross-References panel. Later, if the cross-reference becomes out of date, you can refresh it by clicking the Update Cross-References button .

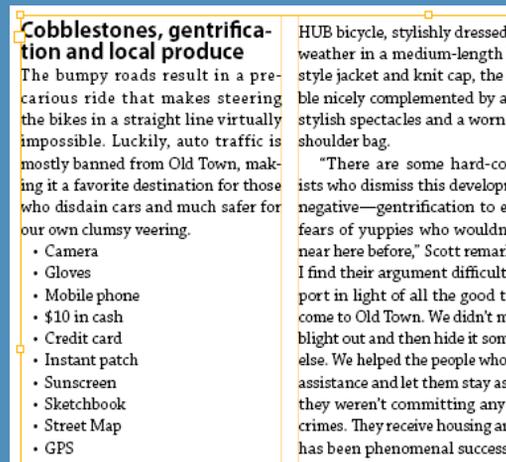
Span columns

When you create a multicolumn text frame (by choosing Object > Text Frame Options), text fits into each column. You can make a paragraph straddle two or more columns of a multicolumn text frame by choosing a “span” option from the Span Columns  menu in the Control panel. You can also define column spanning as part of the definition of a paragraph style.

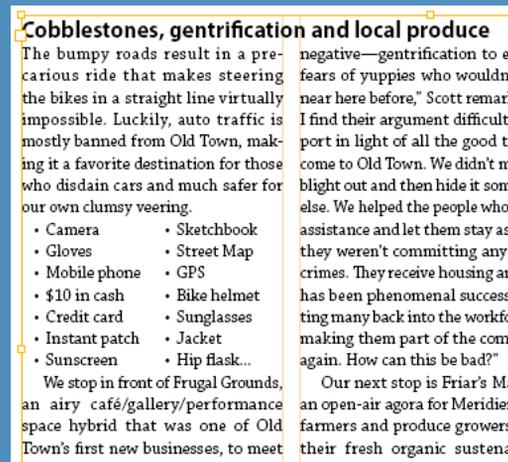
Conversely, you can select two or more paragraphs in a row and choose one of the “split” options from the Span Columns menu. This is helpful when setting a list of bulleted items.

Track changes

Keeping track of changes within a text story can be difficult, especially when there are multiple editors. InDesign makes it much easier with the Track Changes panel (Window > Editorial > Track Changes). To begin tracking, select a story and click the Track Changes  button in the panel. You can also choose Enable Tracking In All Stories from the panel menu.



This story flows from the first column to the next in a multicolumn text frame.



After setting the first paragraph to Span All and the list paragraphs to Split 2, the text fits the frame much better.

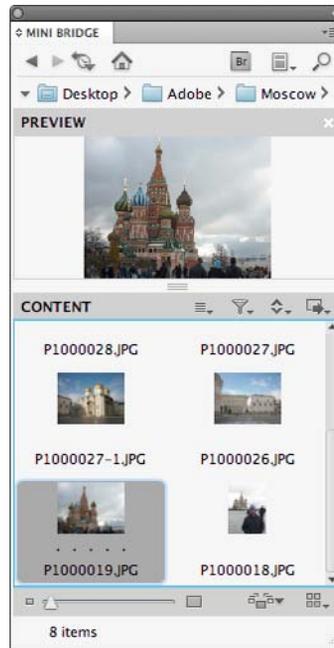
Each edit to a story is tracked based on the name and color of the user (choose File > User). To view the edits, choose Edit > Edit In Story Editor. All additions are highlighted in the user color; deletions appear in both highlight and strikethrough.

You can accept or reject each change by placing your cursor in the text in the Story Editor window and clicking the Accept ✓ or Reject ✗ button in the Track Changes panel, or choosing from the Accept or Reject options in the panel menu.

Mini Bridge

Every InDesign user needs to manage graphics, text files, InDesign files, and other assets on disk. The Mini Bridge panel (Window > Mini Bridge) allows you to see your disk files inside a floating panel in InDesign. Note that the Adobe Bridge application must also be running to take full advantage of the Mini Bridge panel.

To find a file on disk, click the Search icon 🔍 in the Mini Bridge panel. Then you can place the file into your InDesign document by dragging it from the Content pane in the Mini Bridge panel to the document page.



The Mini Bridge panel lets you manage your assets, including InDesign files, Illustrator graphics, Photoshop images, and text files.

To preview a file before you place it, select it in the Mini Bridge panel and press the spacebar to make the image fill your screen. Press the spacebar again to return to your document.

Working with master pages

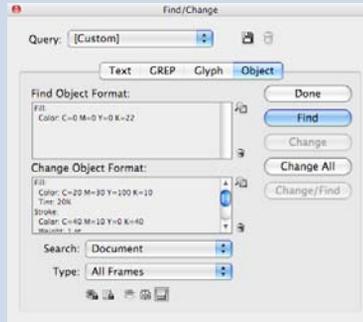
Although you can use master pages in InDesign the same way you use them in QuarkXPress, if you did, you'd be missing an opportunity to improve your efficiency.

For example, you can base one master page on another. Let's say you are laying out a catalog that has five sections, each with a different background page color. You could put the objects that you want on all pages (page number, headers, and so on) on master page A, and then create five master pages based on that one—each with a different colored background. When you need to make a change to all of the master pages (for example, changing the font for the headers), you would need to make the change only to master page A—the other master pages would automatically update. To base one master page on another, use the Based On Master pop-up menu when creating a master page, or select a master page and choose Master Options from the Pages panel menu.

You can apply a master page to more than one document page at a time by choosing Apply Master To Pages from the Pages panel menu.

To copy a single master page from one document to another, make sure both document windows are visible at the same time. Then, make the document with the master page the

The original document contains dozens of frames with a gray background.



After clicking Change All, the targeted frames are converted.



The Object tab of the Find/Change dialog box lets you search for and replace any kind of object formatting. In this case, Find Object Format is set to the background fill color, and Change Object Format is set to apply a different fill color and a 1-point stroke.

active document, and drag the master-page icon from the Pages panel to the other document window.

To copy all the master pages from one document to another, open the destination document as the active document, choose Load Master Pages from the Pages panel menu, and then select the document that contains the master pages.

Finding/changing object formatting

The Edit > Find/Change command lets you search for and replace not only text, but object formatting as well. The Object tab in the Find/Change dialog box offers two fields: Find Object Format and Change Object format. Click inside these fields to edit them. For example, you can search for all objects that

are filled with a yellow swatch and replace that fill with a red-to-white gradient swatch.

Rebuilding default preferences

InDesign stores information for plug-ins, features, and the application itself in its preference files, such as the InDesign Defaults file. A damaged preference file can cause InDesign, or InDesign files, to behave erratically. You can recreate the preference files by holding down Shift+Option+Command+Control (Mac OS) or Shift+Alt+Ctrl (Windows) when starting InDesign, and then click Yes when asked if you want to delete your preference files.

Rebuilding a document with IDML

After opening a QuarkXPress file (see "Opening QuarkXPress files"

on page 17) or Adobe PageMaker® file in InDesign, it's often helpful to rebuild the file via the IDML format. Choose File > Export, give the file a name, choose InDesign Markup (IDML) from the Format pop-up menu, and click Export. Then choose File > Open to open the IDML file you created. This rebuilds the file and strips out any corruption that came from the original document.

If you are not sure about the history of a file, hold down Command (Mac OS) or Ctrl (Windows) and choose About InDesign from the InDesign menu (Mac OS) or the Help menu (Windows). The Document History section of the Adobe InDesign Component Information dialog box displays the background of the current file.

Exporting PDF files

Adobe PDF has long been the backbone of the professional publishing workflow, allowing designers an easy method for sharing documents with printers, colleagues, and readers. The Adobe PDF format is strong yet flexible, suitable for both print and onscreen purposes. From its creation, Adobe InDesign was designed to import and export PDF files better than any other application.

You can export a publication as a single PDF file directly from InDesign, without the need for Adobe Acrobat® Distiller®. This makes for easier and more consistent PDF creation, including industry standards such as PDF/X.

To export an InDesign document as a PDF file, choose File > Export. If your document is destined primarily for print output, then choose Adobe PDF (Print) from the Format menu.

If your document contains interactive elements, such as buttons, and imported SWF animations, choose Adobe PDF (Interactive) from the Format menu.

To export a book or selected chapters in a book, choose Export Book To PDF from the book panel menu.

Print PDF

After you choose Adobe PDF (Print) from the Format menu and click OK, the Export Adobe PDF dialog box appears. The wide range of PDF export options may seem overwhelming at first, but the built-in presets offer an easy way to create high-quality PDF files quickly.

Choosing PDF/X-1a from the Adobe PDF Preset pop-up menu converts all colors to CMYK plus spot colors. Choosing PDF/X-3 maintains RGB colors in the file and includes color profiles. Both options result in all transparency being flattened. Use PDF/X-4 to maintain transparency for Adobe PDF Print Engine output.

If objects bleed off the side of your page, be sure that is accounted for

in the Marks And Bleeds pane of the Export Adobe PDF dialog box. That pane also lets you place print marks (such as crop marks and page information) around your page.

You can save the settings you make in this dialog box by clicking Save Preset. The presets you create can also be used in other Creative Suite applications. To create a PDF file based on a preset without seeing the dialog box, hold down the Shift key while choosing the preset from the File > Adobe PDF Presets menu.

Note that InDesign saves your PDF file in the background, so you can keep working. For large documents, you can view the export progress by choosing Window > Utilities > Background Tasks.

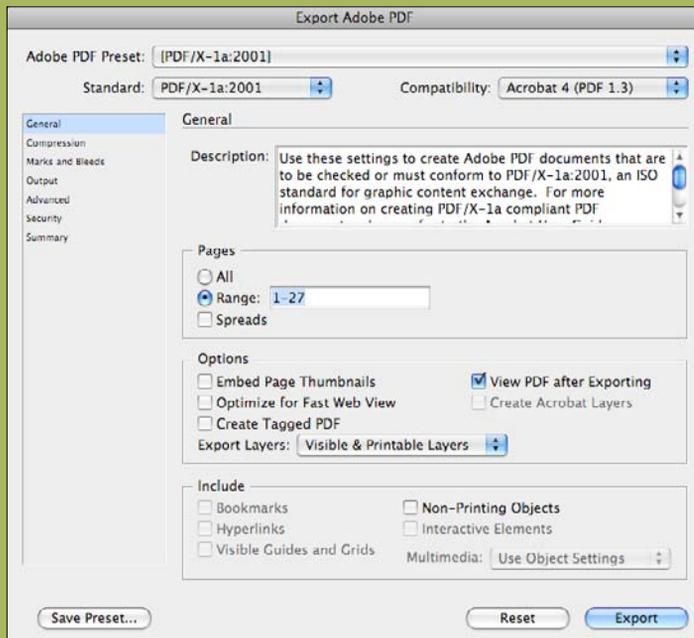
If you prefer to create a PDF file using Acrobat Distiller, you can do that by choosing PostScript File from the Printer pop-up menu in the Print dialog box. After the PostScript file is saved to disk, you can open it in Acrobat Distiller. However, PDF files created with Acrobat Distiller do not support transparency, layers, or interactive elements.

Interactive PDF

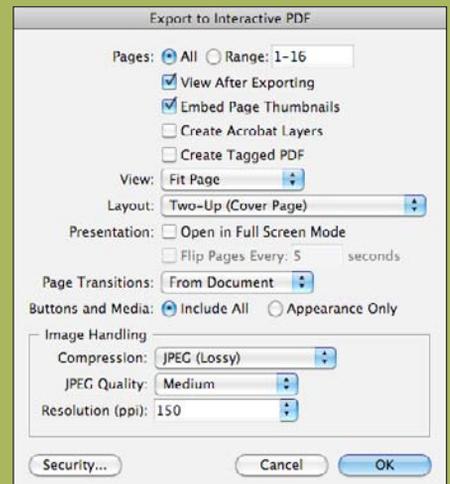
When you choose Adobe PDF (Interactive) from the Format menu, InDesign offers a very different set of options, based on the assumption that the final PDF will be viewed onscreen. Rich-media elements such as movies, animations, sound, hyperlinks, and bookmarks are included by default.

Note that page transitions and automatic page turning are available in Acrobat only when the document is viewed in Full Screen Mode.

For more on interactive features, see [“Rich, interactive documents”](#) on the next page.



You can navigate among the panes listed on the left side of the Print dialog box or the Export Adobe PDF dialog box by holding down Command (Mac OS) or Ctrl (Windows) and pressing numbers from one to seven.



When you choose PDF (Interactive) from the Format menu, the options are relevant for onscreen documents. Many of these options previously required editing your final exported PDF file with Adobe Acrobat Pro software.

Rich, interactive documents

Publishers increasingly need to transform static page layouts into interactive documents that extend editorial content through the use of animation, embedded video, and sound. InDesign offers many tools for creating interactive documents. InDesign also tightly integrates with Adobe Flash Professional CS5 and Adobe Dreamweaver CS5, making cross-media publishing easier.

Buttons

You can add interactivity to your InDesign documents with features such as the Buttons panel, which lets you make rollovers and apply actions to your page objects. Choose Sample Buttons from the Buttons panel menu to view a set of predefined buttons you can use in your documents.

To create your own button, select any object—such as a text frame—and click the Convert Object To A Button icon  at the bottom of the Buttons panel. Then, choose an action from the Actions  menu in the panel, such as Go To Next Page.

Note that buttons, like all interactive elements, do not function on your InDesign page. Instead, you can view interactive content within InDesign by opening the Preview panel



Bookmarks tab in Acrobat or Adobe Reader® software by using the Bookmarks panel (Window > Interactive > Bookmarks) or by selecting the Create PDF Bookmarks option when generating your table of contents.

The Hyperlinks panel (Window > Interactive > Hyperlinks) lets you create both hyperlinks and hyperlinked cross-references (see “Cross-references” on page 45). To make a hyperlink, select text or an object, and then choose New Hyperlink from the Hyperlinks panel menu.

Movies and sound

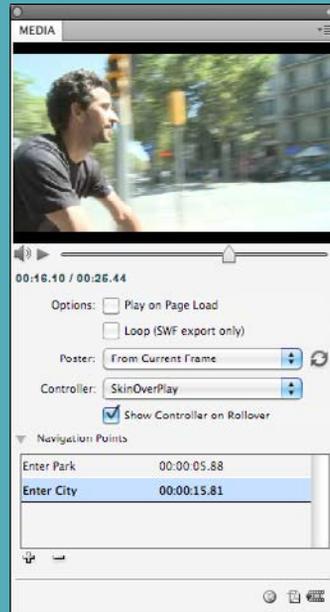
You can easily import movies and sounds into your InDesign documents using File > Place. You can place video files in Flash Video format (FLV and F4V), H.264-encoded files (such as MP4), and SWF files. You can import audio files in MP3 format. Media file types such as QuickTime (MOV), AVI, and MPEG are supported in exported interactive PDF files but not in exported SWF or FLA files.

Once placed, you can use the Media panel (Window > Interactive > Media) to control how the movie or sound file will appear and play.

Animation

The Animation panel (Window > Interactive > Animation) lets you apply preset Flash animations to any object on your page. For example,

You can import movies or sound files into InDesign. The Media panel lets you apply controller skins, add navigation points, and define how the media appears in your final output.



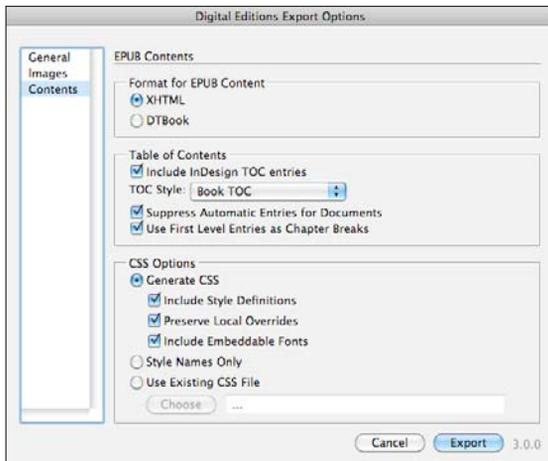
The Preview panel displays your interactive document and lets you interact with it.



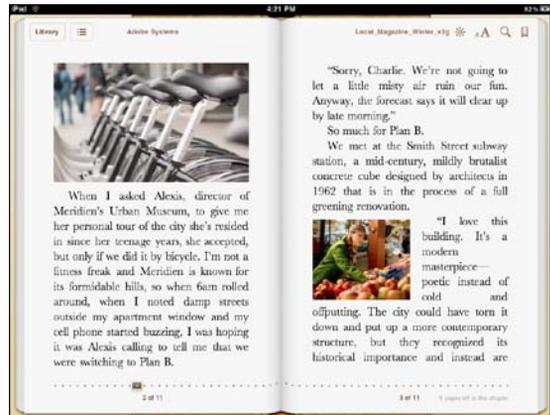
When you export a SWF file from InDesign, you can include the Page Curl effect. This lets the viewer drag pages as though turning a physical page.

Try it yourself by dragging the corners in the image on the right!





Exporting an EPUB file opens the Digital Editions Export Options dialog box, where you can control the styling of the final EPUB document.



An EPUB file appears differently depending on which device it is displayed on. Here, an EPUB file exported from InDesign appears in iBooks on an Apple iPad.

you can select a frame and choose Spin from the Preset pop-up menu in the Animation panel. When you view the page in the Preview panel, you will see that object spin around. The Animation panel offers a number of options for each motion preset.

When you have multiple animations on a spread, you can use the Timing panel (Window > Interactive > Timing) to control the order in which they will play.

Animations you create with the Animation panel are included in exported SWF files, but do not work in PDF files. You can, however, place a SWF animation into an InDesign file, and export that as a PDF document.

HTML export

To export text and graphics for subsequent use in any HTML

web-authoring application, choose File > Export For > Dreamweaver. Then you can specify what content is exported (Selection or Document) and the format in which it's exported.

When you export to XHTML, all of your document's InDesign paragraph, character, and object styles are converted to CSS classes, so you can easily format the XHTML content using cascading style sheets.

EPUB

You can also export your file to the EPUB format, suitable for eBook readers such as Adobe Digital Editions or iBooks on the iPhone or iPad. To do this, choose File > Export For > EPUB. The Digital Editions Export Options dialog box lets you choose whether to base the EPUB file on XHTML or DTBOOK (an XML-based

format from the Daisy Consortium that can help make content available for visually impaired people).

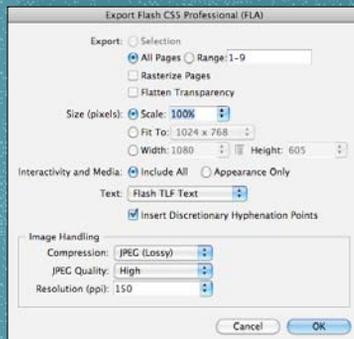
For best results, first use Layout > Table Of Contents Styles to define a list of sections in your document. Then choose that TOC style in the Digital Editions Export dialog box when exporting the EPUB file.

Note that many EPUB readers do not recognize embedded fonts, so you may choose to deselect that option.

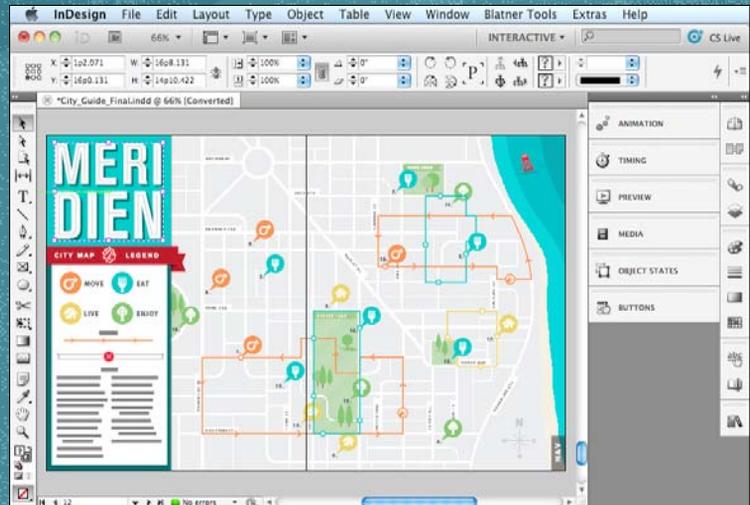
You can also create an EPUB from a book panel by choosing Export Book to EPUB from the book panel menu. If you are using a TOC style, select Suppress Automatic Entries For Documents in the Digital Editions Export Options dialog box to avoid duplicate TOC entries.

From InDesign to Flash Professional

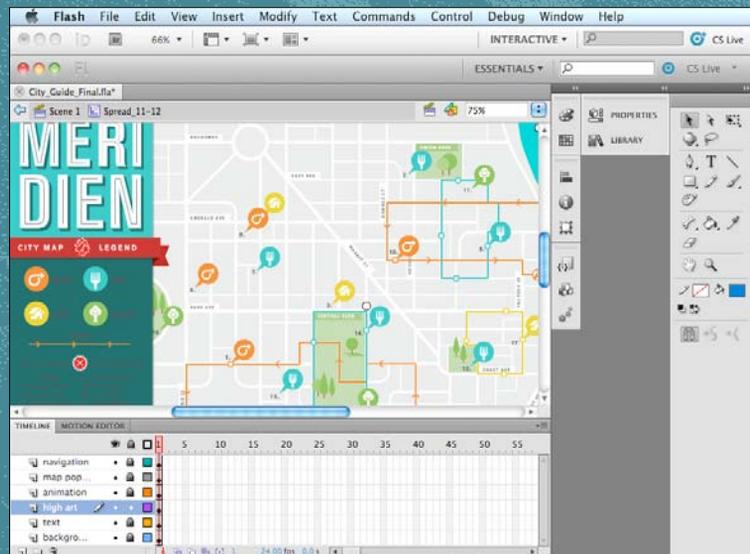
If you need to build a more advanced interactive document, you can export your InDesign file in the Adobe CSS5 Flash Professional (FLA) file format. This preserves the text, graphics, and layouts when the file is opened in Adobe Flash Professional CS5.



To transfer one or more pages of your layout to Flash CS5 Professional, export using the FLA format.



The original document displayed in InDesign.



After opening the exported FLA file in Adobe Flash CS5 Professional, you'll find the layout not only looks the same, but remains editable.

Supercharging your workflow

In the fast-paced world of publishing, it's essential that you find ways to optimize your workflow, whether you're importing and formatting large amounts of text and graphics, working alongside editors, or collaborating with remote clients or colleagues. InDesign offers a number of features to help in these situations. Plus, InDesign is highly extensible and customizable through the use of plug-ins and scripts. InDesign is the hub of your workflow—taking some time to make that workflow efficient is an investment that will pay dividends for years to come.

Data Merge and XML

To maximize profitability, publishers must find the most efficient ways to extract and store content in a format that can be reused. InDesign lets you import data from a database in a number of ways.

The simplest method to import text and graphics from a database or spreadsheet is via the Data Merge panel (Window > Utilities > Data Merge). This lets you import tab- or comma-delimited text files into a template that you create.

For more complex data publishing, InDesign offers extensive support for XML. You can import, create, format, edit, and export XML files using an integrated toolset that includes a Structure pane for viewing and managing tagged content, a Tags

panel (Window > Utilities > Tags) for applying XML tags to content, easy controls for mapping XML styles to text styles (and vice versa), and optional use of Document Type Definition (DTD) files for defining and validating XML structure.

You can also use scripting to generate and format InDesign pages based on imported XML, or apply an XSL transformation (XSLT) when importing or exporting XML content to make it easier to flow XML into InDesign page templates or export it to a database or website.

Share My Screen

When working with others in remote locations, you can choose File > Share My Screen to create a virtual room, based on Adobe ConnectNow (now directly accessible from within

InDesign), where you and two other participants can share a screen; chat via text, audio, or video; or share collaborative whiteboards.

Adobe InCopy CS5

If you need powerful editorial collaboration capabilities, Adobe offers Adobe InCopy® CS5 software, a professional writing and editing program that's tightly integrated with InDesign CS5.

The combined power of InCopy and InDesign lets editorial and design staff—whether offsite or on—work on the same file at the same time, without overwriting each other's work. Designers retain complete control over the design, and writers and editors can produce or edit copy in the context of the layout.

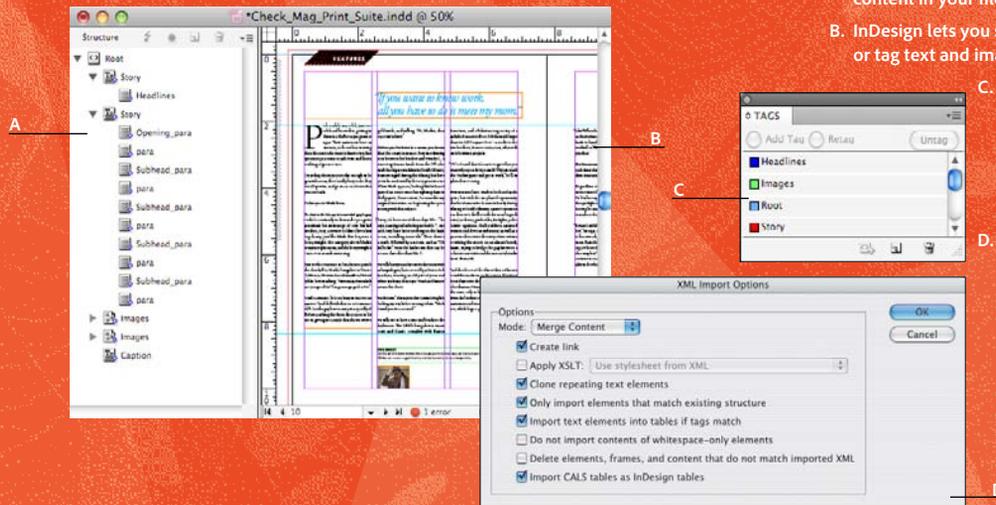
Flexible publishing with XML

A. Choose View > Structure > Show Structure to see the XML Structure pane. This lets you view a hierarchical outline of tagged document elements and imported XML content in your file.

B. InDesign lets you start with a blank template or tag text and images already in a layout.

C. You can tag frames and content easily within the layout for import and export using the Tags panel (Window > Utilities > Tags).

D. Achieve the results you want on import through extensive XML import controls (File > Import XML), including the ability to link to XML files so you can update data quickly when the XML file changes.

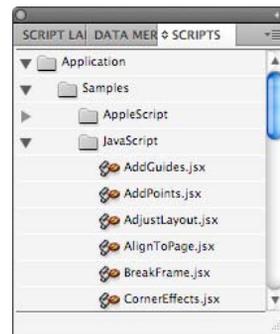


Plug-ins and scripts

Plug-ins and scripts add many functional features to InDesign that can increase your efficiency. You can find about 20 sample scripts by choosing Window > Utilities > Scripts, and then opening the Application > Samples > JavaScript folders inside the Scripts panel. These scripts add features such as the ability to sort paragraphs alphabetically, split a frame into a grid of smaller frames, and add crop and registration marks around any object on your page.

Virtually every aspect of InDesign is scriptable through standard scripting languages, including JavaScript for cross-platform scripting, AppleScript, and vbscript. For information on scripting, visit www.adobe.com/products/indesign/scripting.

For additional information on XML, Adobe ConnectNow, or finding and using third-party plug-ins and scripts, see “InDesign CS5 resources” on the next page.



Anything you can do in InDesign can be automated using a script. The Scripts panel displays a list of available scripts, including several samples you can use. Double-click a script in the panel to launch the script.



InDesign CS5 resources

The growing popularity of InDesign has created an extensive community of service providers, trainers, plug-in developers, system integrators, and others who provide support for InDesign users. Whether you're in the process of preparing to switch to InDesign or you're already up and running, you can tap into a broad range of helpful resources.

Support

- **Adobe InDesign**
www.adobe.com/products/indesign
Find links to product information, customer stories, reviews, awards, events, and InDesign related downloads, as well as support- and training-related links.

- **Adobe Community Help**
<http://community.adobe.com/help/index.html>
Find answers to your InDesign and InCopy product questions through this online service.

- **Adobe InDesign and InCopy Help and Support**
www.adobe.com/support/products/indesign.html
Find links to top support issues, tutorials, support-related announcements, and user forums.

- **Adobe Forums**
www.adobe.com/support/forums
Access links to user forums for all Adobe products, including InDesign and InCopy.

- **Adobe Partner Finder**
<http://partners.adobe.com>
Locate print service providers, trainers, and developers worldwide who support InDesign.

Training and tutorials

- **InDesign How To**
www.adobe.com/products/indesign/howto
Learn about new InDesign features and more.

- **Adobe TV**
<http://tv.adobe.com>
Check out Adobe TV, a free online video resource for expert instruction and inspiration about InDesign and other Creative Suite products from Adobe.

- **Adobe InDesign CS5 Classroom in a Book®**
www.adobe.com/press.com
Quickly learn InDesign CS5 using a series of self-paced, project-based lessons.

- **lynda.com**
www.lynda.com
Choose from hundreds of InDesign CS5 training videos in the lynda.com online training library.

- **Total Training**
www.totaltraining.com
Get up to speed quickly and easily with these comprehensive InDesign CS5 training videos.

- **Kelby Training**
kelbytraining.com
Watch movies or read articles by InDesign professionals on a wide variety of topics.

- **Adobe InDesign Training**
www.adobe.com/support/training/products/indesign.html
Find a variety of training resources to meet your needs.

Third-party plug-ins

- **InDesign CS5 and InCopy CS5 third-party plug-ins**
www.adobe.com/products/plugins/indesign
www.adobe.com/products/plugins/incopy
Learn about third-party plug-ins available for InDesign CS5 and InCopy CS5.

Automation

- **InDesign CS5 scripting and XML**
www.adobe.com/products/indesign/scripting
Check out this online resource for information on automating publishing with InDesign using XML, IDML, and scripts.
- **JDF-enabled workflow**
www.adobe.com/studio/print/pdfs/JDF-WP_A9_updates_july08.pdf
Check out this useful job ticket guide for JDF-enabled workflows.

InDesign Family

- **Adobe InCopy CS5**
www.adobe.com/products/incopy
Learn more about Adobe InCopy CS5 and using InDesign and InCopy together.
- **InDesign CS5 Server**
www.adobe.com/products/indesignserver
Learn more about InDesign CS5 Server and its role in the publishing workflow.

Other resources

- **Online bookstores**
<http://isbn.nu>
Visit online bookstores to search for books about InDesign CS5.
- **InDesign User Groups**
www.indesignusergroup.com
Join one of the InDesign User Groups that have formed in major cities across the world.
- **InDesign Magazine**
www.indesignmag.com
Peruse *InDesign Magazine*, a bimonthly PDF periodical devoted entirely to InDesign and the growing community of InDesign professionals. Also, sign up for a free weekly InDesign tip!
- **InDesignSecrets**
www.InDesignSecrets.com
Keep up to date on the latest InDesign news with InDesign Secrets, an independent website with expert podcasts, blogs, tutorials, and more. For tips on InCopy, try **InCopy Secrets**: www.incopyscrets.com.
- **Inside Adobe InDesign**
www.elijournals.com
Go beyond the manual with each issue of *Inside Adobe InDesign*.
- **Adobe Print Resource Center**
www.adobe.com/print
Learn more about print publishing technology, printing documents that contain transparency, partner solutions, and Adobe products.
- **Custom Editorial Publishing Solutions**
www.adobe.com/products/indesign/integrated
Learn about layout and editorial publishing solutions built on top of core Adobe InDesign technology.
- **Adobe Creative Suite 5 eSeminars**
www.adobe.com/events
Register for free Creative Suite 5 eSeminars and how to get the most out of InDesign CS5.
- **Print and ePublishing Conference**
<http://indesignsecretslive.com>
Plan to attend the next Print and ePublishing Conference or an InDesign seminar. These leading InDesign experts will show you their tips and techniques.
- **Adobe InDesign blogs and social media pages**
www.adobe.com/products/indesign/blogs/
www.twitter.com/indesign
www.facebook.com/indesign
Explore InDesign blogs and other websites to learn the latest information about InDesign CS5.

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