Adobe InDesign

2021 release

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Classroom in a Book®

The official training workbook from Adobe

Kelly Kordes Anton & Tina DeJarld

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Adobe InDesign Classroom in a Book® (2021 release)

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Cover Illustration: Birgit Palma & Daniel Triendl
Interior Designer: Mimi Heft

ISBN-13: 978-0-13-687028-9
ISBN-10: 0-13-687028-7

ScoutAutomatedPrintCode

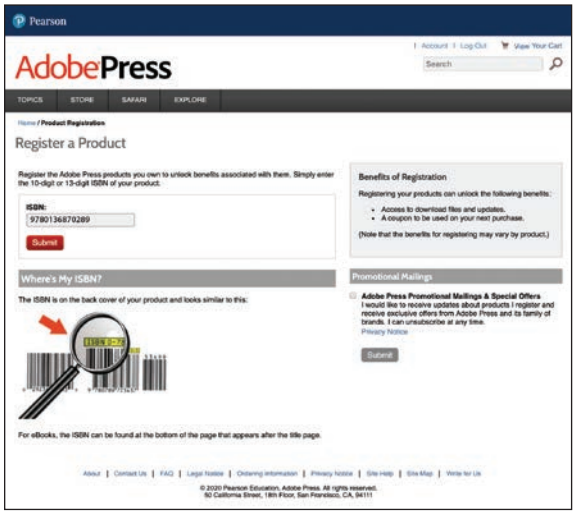
WHERE ARE THE LESSON FILES?

Purchase of this Classroom in a Book in any format gives you access to the lesson files you'll need to complete the exercises in the book.

1 Go to www.adobepress.com/InDesignCIB2021.

2 Sign in or create a new account.

3 Click Submit.



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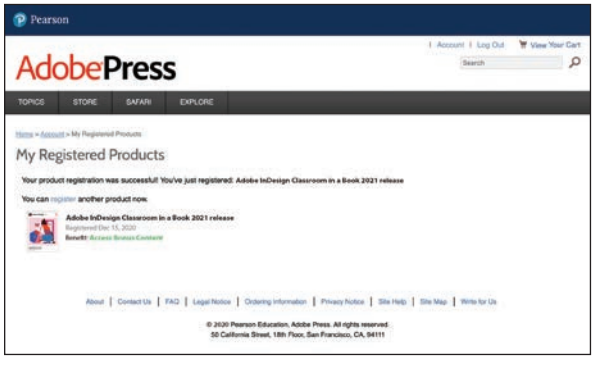

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Kelly Kordes Anton has written and edited dozens of books and training resources on publishing technologies and InDesign, including eight previous editions of *Adobe InDesign Classroom in a Book*. She is a freelance writer based in Littleton, Colorado.

Tina DeJarld has worked on the front lines of taking designs from the computer screen to real-world production since before InDesign 1.0. As both a prepress professional and production designer building files that will work correctly, she has handled thousands of large and complex projects, becoming an expert on InDesign best practices and techniques. Tina is currently senior production artist at Prodigious Worldwide, a creative agency in Chicago.

Acknowledgments

This book would not have been possible without the contributions of several invaluable collaborators. The authors would like to thank Laura Norman for putting together a strong team; Jonathan Gordon, technical editor, for ensuring the accuracy of every word on every page; Megan Ahearn, keystroker, for testing every step in every lesson; Elizabeth Welch, copyeditor, and Scout Festa, proofreader, for making sure every i was dotted and every t was crossed; Danielle Foster, production specialist, for polishing the layout of every page and preparing final files for print; and Tracey Croom, senior production editor at Pearson, for overseeing the entire production process and keeping everybody informed and on track. In addition, we appreciate the invaluable influence of John Cruise, whose contributions remain throughout this book.

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GETTING STARTED

Welcome to Adobe® InDesign® (2021 release), a powerful page-design and production application that offers precision, control, and seamless integration with other Adobe professional graphics software. Writers, artists, designers, and publishers can communicate to a broader audience than ever before through an unprecedented variety of media.

Using InDesign, you can produce professional-quality, full-color documents and print them using a variety of output devices, including desktop printers, high-resolution imaging devices, and high-volume color printing presses. In addition, you can design publications for a broad range of electronic devices, such as tablets, smartphones, and e-readers, and export InDesign documents in several formats, including PDF, HTML, and EPUB. InDesign supports this with its seamless integration with other Adobe Creative Cloud (CC) components.

About Classroom in a Book

Adobe InDesign Classroom in a Book® (2021 release) is part of the official training series for Adobe graphics and publishing software developed with the support of Adobe product experts. The lessons are designed so that you can learn at your own pace. If you're new to Adobe InDesign, you'll master the fundamentals and learn to put the software to work for you. If you've already been using InDesign, you'll find that this book teaches many advanced features and best practices, including tips and techniques for using the latest version of InDesign.

Each lesson provides step-by-step instructions for creating a specific project. You can follow the book from start to finish or do only the lessons that meet your interests and needs. Each lesson concludes with several optional tasks that let you further explore the features covered in the lesson, as well as a set of review questions and answers.

Prerequisites

Before beginning to use *Adobe InDesign Classroom in a Book (2021 release)*, you should have a working knowledge of your computer and its operating

system. Make sure that you know how to use the mouse and standard menus and commands along with how to open, save, and close files. If you need to review these techniques, see the help resources included with your operating system. Note that when instructions differ by platform, Windows commands appear first, followed by the macOS commands, with the platform noted in parentheses; for example, "Alt-click (Windows) or Option-click (macOS) the button."

Installing the software

Before you begin using Adobe InDesign Classroom in a Book *(2021 release)*, make sure that your system is set up correctly and that you've installed the proper software and hardware.

The Adobe InDesign software is not included with this book; you must purchase the software separately (visit adobe.com/products/indesign). In addition to InDesign, some lessons in this book have steps that can be performed with other Adobe applications. You must install these applications from Adobe Creative Cloud onto your computer. Follow the onscreen instructions.

Adobe Creative Cloud desktop app

In addition to Adobe InDesign, this training requires the Adobe Creative Cloud desktop application, which provides a central location for managing the dozens of apps and services included in a Creative Cloud membership. You can use the Creative Cloud desktop application to access your Adobe Account; download and install, launch, and uninstall applications; sync and share files; manage fonts and CC libraries; access libraries of stock photography and design assets; and showcase and discover creative work in the design community through Behance.

The Creative Cloud desktop application is installed automatically when you download your first Creative Cloud product. If you have Adobe Application Manager installed, it auto-updates to the Creative Cloud desktop application. If the Creative Cloud desktop application is not installed on your computer, click the Download button at adobe.com/creativecloud/desktop-app.html.

Classroom in a Book fonts

Most of the fonts used in the Classroom in a Book lesson files are installed with InDesign. Some fonts are not installed with InDesign but are instead available through Adobe Fonts, an online font service that offers free access to a vast library of fonts for use in desktop applications and on websites.

The Adobe Fonts service is integrated with InDesign's font selection features and the Creative Cloud Desktop application. Adobe Fonts is included with your Creative Cloud subscription. Internet access is required to activate Adobe Fonts.

Online content

Your purchase of this Classroom in a Book includes online materials provided by way of your Account page on adobepress.com. These include:

Lesson files

To work through the projects in this book, you will need to download the lesson files by following the instructions below.

Web Edition

The Web Edition is an online interactive version of the book providing an enhanced learning experience. Your Web Edition can be accessed from any device with a connection to the internet, and it contains:

- The complete text of the book
- Hours of instructional video keyed to the text
- Interactive quizzes

Accessing the lesson files and Web Edition

You must register your purchase on adobepress.com to access the online content:

1. Go to www.adobepress.com/InDesignCIB2021.
2. Sign in or create a new account.
3. Click Submit.
4. Answer the question as proof of purchase.
5. The lesson files can be accessed from the Registered Products tab on your Account page.
   - Click the Access Bonus Content link below the title of your product to proceed to the download page.
   - Click the lesson file link(s) to download them to your computer.
6. The Web Edition can be accessed from the Digital Purchases tab on your Account page. Click the Launch link to access the product.

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Saving and restoring the InDesign Defaults file

The InDesign Defaults file stores program preferences and default settings, such as tool settings and the default unit of measurement. To ensure that the preferences and default settings of your InDesign program match those used in this book, move the current InDesign Defaults file to a different location before you begin working on the lessons. When you have finished the book, you can return the saved InDesign Defaults file to its original folder, which restores the preferences and default settings used before you started working on the lessons.

Moving the current InDesign Defaults file

Note: If you can't find the InDesign Defaults file, either you haven't started Adobe InDesign yet or you have already moved the preferences file. The preferences file is created after you launch the program the first time and is updated thereafter.

Moving the InDesign Defaults file to another location prompts InDesign to automatically create a new one with all preferences and defaults set to their original factory settings.

1. Quit Adobe InDesign.
2. Locate the InDesign Defaults file on Windows or macOS as described below.
3. If you want to restore customized preferences, move the file to another folder on your hard drive. Otherwise, you can delete the file.
4. Start Adobe InDesign.

Locating the InDesign Defaults file on Windows

Note: If hidden files are visible and you still cannot locate the preferences file, use your operating system's Find File feature and search for "InDesign Defaults."

The InDesign Defaults file is located in the folder [*startup drive*]\Users\[*username*]\AppData\Roaming\Adobe\InDesign\Version 16.0\en_US*\InDesign Defaults.

- The folder name may be different depending on the language version you have installed.
- The AppData folder is hidden by default on Windows 10. To display the AppData folder, click Appearance And Personalization in the Control Panel, and then click File Explorer Options.
- Click the View tab in the File Explorer Options dialog box; select Show Hidden Files, Folders, And Drives, and then click OK.

Locating the InDesign Defaults file on macOS

The InDesign Defaults file is located in the folder [*startup drive*]/Users/[*username*]/Library/Preferences/Adobe InDesign/Version 16.0/en_US*/InDesign Defaults.

- The folder name may be different depending on the language version you have installed.
- To access the Library folder, choose Go > Go To Folder from the Finder menu. Type **~/Library** in the Go To The Folder box, and then click OK or Go.

Restoring the saved InDesign Defaults file

If you want to restore your customized InDesign Defaults file that you moved to another location:

1. Quit InDesign.
2. Locate your saved InDesign Defaults file, drag it back into its original folder, and replace the current InDesign Defaults file.

Training resources

Adobe InDesign Classroom in a Book (2021 release) is not meant to replace documentation that comes with the program or to be a comprehensive reference for every feature. Only the commands and options used in the lessons are explained in this book. For comprehensive information about program features and tutorials, refer to these resources:

Note: Adobe periodically provides updates to software. You can easily obtain these updates through Creative Cloud.

Adobe InDesign Learn & Support: helpx.adobe.com/indesign.html is where you can find and browse Help and Support content on Adobe.com. Adobe InDesign Help and Adobe InDesign Support Center are accessible from the Help menu in InDesign.

Adobe Support Community: community.adobe.com lets you tap into peer-to-peer discussions, questions, and answers on Adobe products.

Adobe InDesign product home page: adobe.com/products/indesign provides information about new features and intuitive ways to create professional print and digital layouts.

Adobe Add-ons: creative.adobe.com/addons is a central resource for finding tools, services, extensions, code samples, and more to supplement and extend your Adobe products.

Resources for educators: adobe.com/education and edex.adobe.com offer a treasure trove of information for instructors who teach classes on Adobe software. Find solutions for education at all levels, including free curricula that use an integrated approach to teaching Adobe software and can be used to prepare for the Adobe Certified Associate exams.

Adobe Authorized Training Centers: Adobe Authorized Training Centers (AATCs) employ only Adobe Certified Instructors and offer instructor-led courses and training on Adobe products. A directory of AATCs is available at learning.adobe.com/partner-finder.

1 INTRODUCING THE WORKSPACE

Lesson overview

In this lesson, you'll learn how to do the following:

- Open documents.
- Select and use tools.
- View information in the Properties panel.
- Use the Control panel.
- Manage document windows.
- Work with panels.
- Customize the workspace.
- Change the magnification of a document.
- Navigate through a document.
- Use context menus and panel menus.
- Change Interface preferences.

This lesson will take about 45 minutes to complete. To get the lesson files used in this chapter, download them from the web page for this book at www.adobepress.com/InDesignCIB2021. For more information, see "Accessing the lesson files and Web Edition" in the Getting Started section at the beginning of this book.

WORKSHOP

Plant a Humming-bird Garden

Learn to select and tend flowers that attract hummingbirds, flourish in our climate and create fabulous flowerbeds.

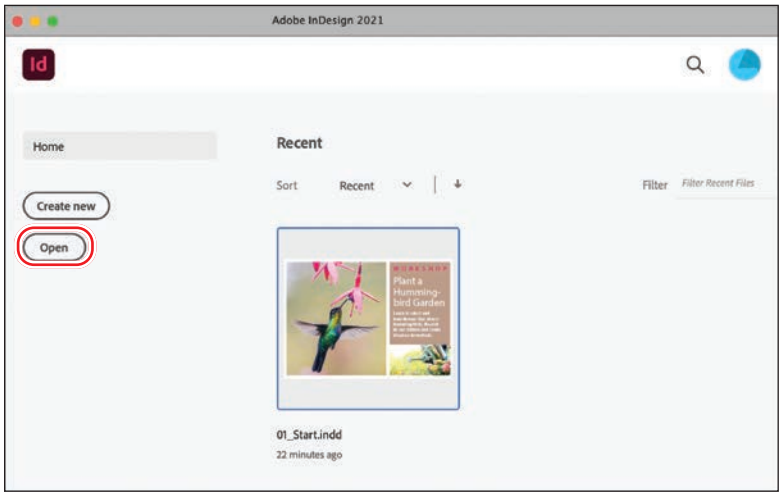
The intuitive Adobe InDesign interface makes it easy to create compelling layouts. It is important to understand the InDesign work area to make the most of its powerful layout and design capabilities. The customizable work area consists of the document window, menus, pasteboard, Tools panel, and other panels, such as the Properties panel.

Getting started

In this lesson, you'll practice using tools and panels and navigating through a simple layout. You will use this document only to explore the InDesign work area. The lesson file represents the final version of the document—you will not make permanent changes to objects, add graphics, or modify text. Rather, you will reverse any changes you make using Edit > Undo. Understanding the Undo feature helps you experiment and recover from any mistakes.

Note: If you have not already downloaded the project files for this lesson to your computer from your Account page, make sure to do so now. See "Getting Started" at the beginning of the book.

1. To ensure that the preferences and default settings of your InDesign program match those used in this lesson, move the InDesign Defaults file to a different folder following the procedure in "Saving and restoring the InDesign Defaults file" on pages 4–5.
2. Start InDesign. The InDesign Home screen displays.
3. Click the Open button. (If the Home screen does not display, choose File > Open from the InDesign menu bar.)



Note: The screen captures in this book show the Medium Light interface. Interface elements such as panels and dialog boxes will be darker on your screen if you are using the default interface. You will learn to change this interface preference later in the lesson.

4. Open the 01_Start.indd file in the Lesson01 folder, located inside the Lessons folder within the InDesignCIB folder on your hard drive.
5. If an alert informs you that the document contains links to sources that have been modified, click Update Modified Links.
6. If the Welcome panel or the Learn panel displays, click its close box in the upper-left corner.
7. Choose File > Save As, rename the file **01_Intro.indd**, and save it in the Lesson01 folder.
8. Using the scroll bars on the document window, scroll down to see the second page of the postcard, and then scroll back up to the first page of the postcard.

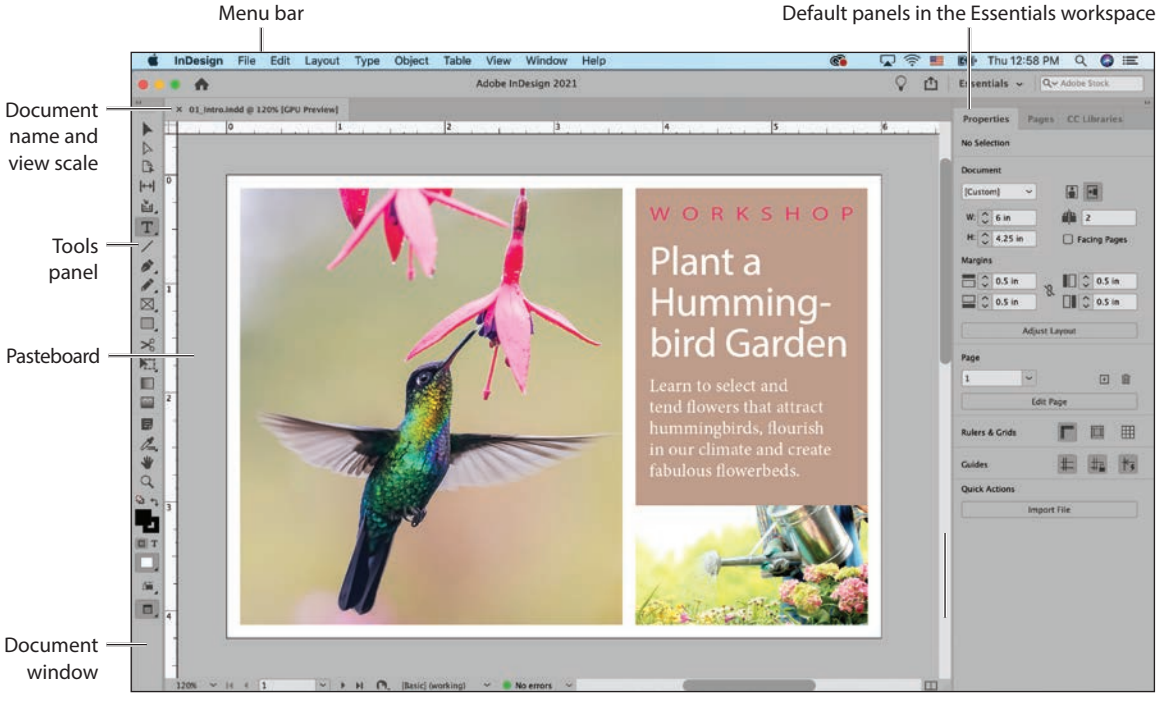
Looking at the workspace

The InDesign work area encompasses everything you see when you first open or create a document. By default, InDesign shows tools and panels available in the Essentials workspace. You can customize the InDesign work area to suit your work style. For example, you can choose to display only the panels you frequently use, minimize and rearrange panel groups, resize windows, and so on. By default you will see the following:

- The menu bar at the top of the screen
- The Tools panel, docked at the left side of the screen
- The Properties panel and other commonly used panels, docked at the right side of the screen

The configuration of the panels in the work area is referred to as the "workspace." You can save your custom workspace setup or choose among special-purpose set-ups, such as Digital Publishing, Printing And Proofing, and Typography.

Note: The first time you open a document, tool tips appear next to panels in the work area, and the Learn panel displays. Click the Learn panel's close box to hide it.



Selecting and using tools

Tip: The building blocks of InDesign pages are objects, which include frames (for containing text and graphics) and lines.

The Tools panel contains tools for creating and modifying page objects, adding and formatting text and images, and working with color. By default, the Tools panel is docked to the upper-left corner of the work area. In this exercise, you will select and experiment with several tools.

Using the Selection tool

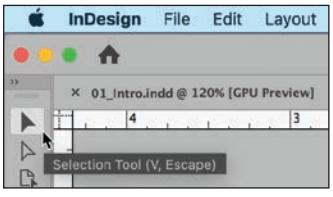
The Selection tool lets you move and resize objects, and it lets you select objects for formatting, such as applying a fill color. Here, you will click to select the Selection tool. Later, you will experiment with other methods of selecting tools.

1 Locate the Tools panel at the far-left side of the screen.

2 Point at each tool in the Tools panel to see its name.

3 Click the Selection tool ( ) at the top of the Tools panel.

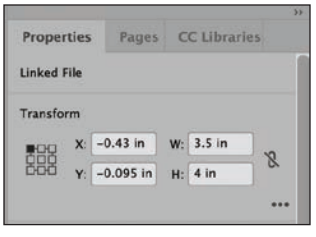
Note: If you do not see tool tips when pointing at tools, select Tools Tips in InDesign Preferences. To do this, choose Edit > Preferences (Windows) or InDesign > Preferences (macOS) and click Interface. Tool Tips settings are found under Cursor And Gesture Options.



4 Click near the hummingbird's beak to select the graphics frame containing the hummingbird photograph.

5 Drag the frame up and to the left to see how frames move.

The frame's location on the page is shown near the Selection tool pointer and in the Properties panel at the right. In addition to viewing information in this panel, you can make adjustments to selected objects. For example, you can crop the image.



6 After you release the mouse button, press Ctrl+Z (Windows) or Command+Z (macOS) to undo the move.

7 With the Selection tool still selected, click other objects on the page and drag them to new locations. The page contains another image in a graphics frame, a rectangular text frame, and an elliptical text frame. Undo each move immediately after you do it.

Using the Type tool

Now you will switch to the Type tool, which lets you enter, edit, and format text. Rather than clicking to select it, you will use its keyboard shortcut.

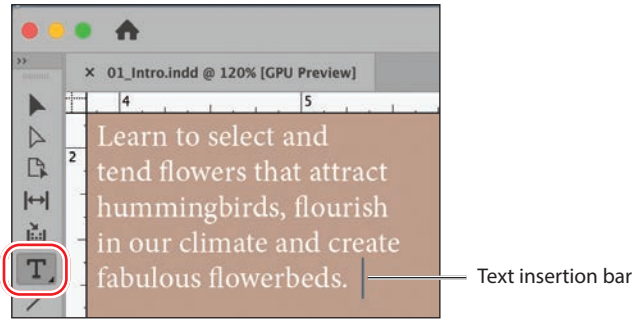
1 Point at the Type tool (T) to display its tool tip. The letter shown in parentheses indicates a single-letter keyboard shortcut for selecting this tool. In this case, the letter is T.

2 Point at various other tools to see their single-letter keyboard shortcuts.

3 Press T on the keyboard to select the Type tool. Click after the word "flowerbeds" and the period on the right side of the postcard.

4 Type a space and a few characters to get a feel for the Type tool.

Note: The single-letter shortcuts do not work when the text insertion bar is in text.



5 Press Ctrl+Z (Windows) or Command+Z (macOS) to undo any changes to the postcard text.

6 With the Type tool still selected, click in other words and revise the text. Undo each change immediately after you do so.

Tip: As you learn InDesign and experiment with layouts, remember that you can undo as many changes as you want.

Using the Line tool and Hand tool

Now you will switch to the Line tool, which lets you create horizontal, vertical, and diagonal lines. Once you have experimented with the Line tool, you will select the Hand tool temporarily by holding its keyboard shortcut: H. When you release the keyboard shortcut, InDesign reverts to the previously selected tool. This technique is useful for quickly using a tool—for example, you might use the Hand tool to move to another area of a page and then create a line there.

Tip: To constrain the Line tool to creating horizontal, vertical, or 45-degree lines, press the Shift key as you draw.

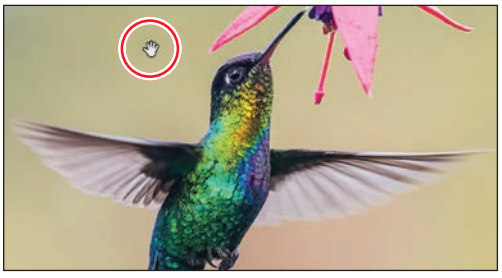
1 Click the Line tool (/) to select it.

2 Drag to create a line anywhere on the page.

3 With the Line tool still selected, press and hold the H key on the keyboard. While you hold the H key, the Hand tool ( ) is selected.

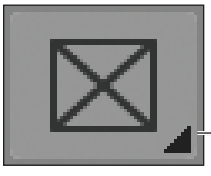
4 Drag the Hand tool around to view another area of the page. When you release the H key, the Line tool remains selected.

5 Press Ctrl+Z (Windows) or Command+Z (macOS) to undo the line creation.



Using the Rectangle Frame tool and the Ellipse Frame tool

So far, you have selected tools that display on the Tools panel in three ways: (1) clicking them, (2) pressing a keyboard shortcut, and (3) holding a keyboard shortcut to select the tool temporarily. Now, you will select a tool that is not visible on the Tools panel. A small triangle in the lower-right corner of a tool indicates a menu of additional hidden tools.



The triangle indicates a menu of additional tools.

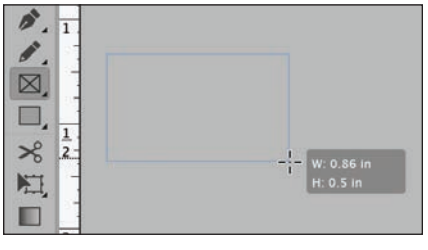
In this exercise, you will create frames by selecting and using the Rectangle Frame tool and then the Ellipse Frame tool. You would create these frames to contain imported graphics and text.

1 Choose View > Screen Mode > Normal so that you can see the frames that contain graphics and text.

2 Press F on the keyboard to select the Rectangle Frame tool (⊠).

Tip: To easily create a square or circle, press the Shift key while you draw with the Rectangle Frame tool or with the Ellipse Frame tool.

3 Scroll to the left to view the pasteboard surrounding the document. Click and drag to create a rectangular graphics frame.

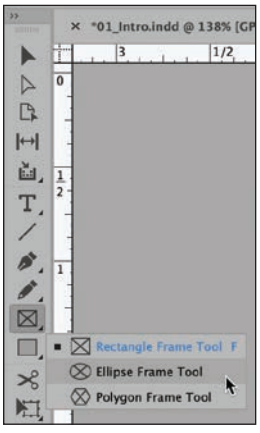


4 Press Ctrl+Z (Windows) or Command+Z (macOS) to undo the frame creation.

5 To see the Ellipse Frame tool, press and hold on the Rectangle Frame tool to display additional hidden tools.

6 Select the Ellipse Frame tool (⊗), and notice how it replaces the Rectangle Frame tool.

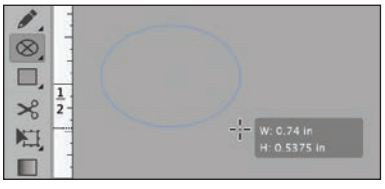
▶ **Tip:** You can Alt-click (Windows) or Option-click (macOS) a tool in the Tools panel to alternate between the tools in a menu.

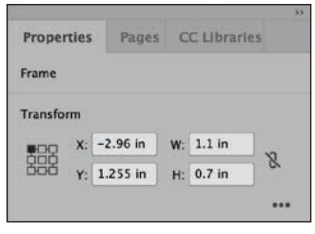


7 Drag to create an oval graphics frame anywhere on the page or pasteboard.

8 Notice the object placement information shown in the Transform area of the Properties panel. Press Ctrl+Z or Command+Z as many times as necessary to undo the frame creation.

▶ **Tip:** Other options in the Properties panel allow you to format any selected object. For example, you can apply a fill color or stroke to the object.





9 Press and hold the Ellipse Frame tool to display the menu, and choose the Rectangle Frame tool to display it again. This is the default tool that displays.

10 Review the remaining hidden tools. Click each tool with a triangle and hold down the mouse button to see its menu of additional tools. The tools with menus for hidden tools include Content Collector, Type, Pen, Pencil, Rectangle Frame, Rectangle, Free Transform, Color Theme, Apply Color, View Options, and Screen Mode.

Reviewing the Control panel

InDesign provides many more panels than are shown in the default Essentials workspace. In this exercise, you will switch to the Advanced workspace to view the Control panel, which displays immediately below the menu bar and offers quick access to full options for editing selected objects.

As with the Properties panel, the Control panel is context sensitive, which means it displays settings based on what you have selected on the page. Additionally, the Control panel displays more or less settings depending on the size of your screen.

▶ **Tip:** To customize the options showing in the Control panel, click the gear icon ( ) at the far-right side of the panel.

1. If necessary, choose View > Screen Mode > Normal so that you can see the frames that contain graphics and text.
2. To ensure that the panels and menu commands match those used in this lesson, choose Window > Workspace > [Advanced], and then choose Window > Workspace > Reset Advanced. Notice the Control panel across the top of the screen.
3. In the Tools panel, select the Direct Selection tool ( ).
4. Click the hummingbird image. The Control panel provides options for controlling the size and position of the graphics frame, the scale of the image, and other attributes.

▶ **Tip:** You can also move and resize objects by entering values in these fields and by dragging objects with the mouse.

5. In the Control panel, click the up and down arrows next to the Scale X Percentage and Scale Y Percentage fields to see how you can resize the image.

6. Press Ctrl+Z (Windows) or Command+Z (macOS) as many times as necessary to undo any changes.
7. In the Tools panel, select the Type tool ( ).
8. Click in the word "Hummingbirds." The Control panel now provides options for controlling paragraph and character formatting. If necessary, click Character Formatting Controls ( ) at the far left side of the Control panel.

▶ **Tip:** Press the Shift key while clicking the up and down arrows to increase the size in larger increments.

9. Double-click to select the word "Hummingbirds" and click once on the down arrow on the Font Size field, as shown, to decrease the size of the type.

10. Press Ctrl+Z or Command+Z to undo the change.
11. Click the pasteboard (the blank area outside the pages) to deselect the text.

Reviewing the document window and pasteboard

The document window and pasteboard have the following characteristics:

- Controls for displaying different pages in the document are in the lower-left corner of the document window.
- Each page or spread is surrounded by its own pasteboard.
- You can use the pasteboard as a work area or a storage area—for example, to place design elements not yet included in the page layout.

▶ **Tip:** You can change the size of the pasteboard in Preferences > Guides & Pasteboard > Pasteboard Options.

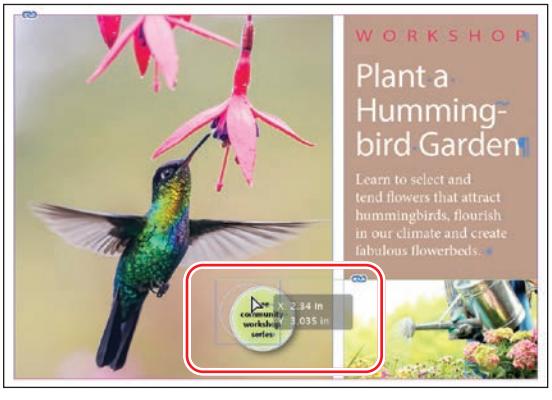
Now, you will look at the pasteboard and review features on the document window.

1 To see all the pages in the document and the pasteboard, you will decrease the view scale. Click the Zoom Level menu in the lower-left corner of the document window, and then select 75% from the menu.

In the 75% view, you will see a circular text frame on the pasteboard to the right of page 1.

2 In the Tools panel, select the Selection tool ( ).

3 Click the circular text frame, which contains the words "free community workshop series." Drag the frame to the document page and see how it looks in various spots.

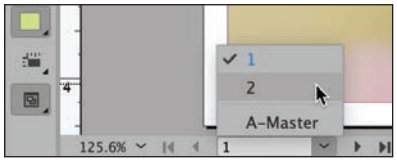


4 Press Ctrl+Z (Windows) or Command+Z (macOS) to undo the change.

5 Choose View > Fit Page In Window.

6 In the lower-left corner of the document window, click the arrow next to the Page Number box to display a menu of document pages and master pages.

7 Choose 2 from the menu to display page 2 in the document window.



8 Click the arrow to the left of the Page Number box to turn back to page 1.

9 Choose View > Screen Mode > Preview to hide the frame guides.

Working with multiple document windows

When you open multiple documents, each document displays in its own tab of the main document window. You can also open multiple windows for a single document so that you can see different parts of the layout at one time. Essentially, you can see more than one view of a document at the same time. Here, you'll create a second window so that you can see how changes to the headline affect the entire page. The techniques you use here for arranging document windows can be used with different views of the same document and for any other open documents.

1 Choose Window > Arrange > New Window For 01_Intro.indd.

A new window, titled 01_Intro.indd:2, opens. The original window is now titled 01_Intro.indd:1.

2 Select the Zoom tool (🔍) in the Tools panel.

3 In the second window, 01_Intro.indd:2, click five times on the word "WORKSHOP" to zoom in on the text.

Notice that the other window stays at its original magnification.

4 Press T on the keyboard to select the Type tool (T).

5 In the second window, click at the end of the word "WORKSHOP" and add an "S" to make it plural: WORKSHOPS.

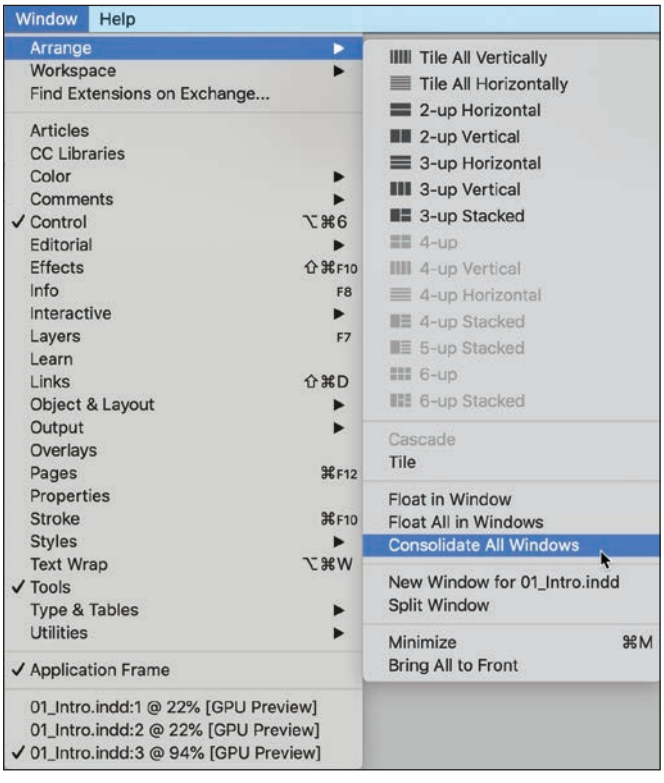
Notice the change in both windows.

6 Press Ctrl+Z (Windows) or Command+Z (macOS) to restore the word "WORKSHOP."

7 Choose Window > Arrange > New Window For 01_Intro.indd to create additional windows.

8 Choose options from the Window > Arrange submenu to see the various ways to arrange open windows.

9 Choose Window > Arrange > Consolidate All Windows. This creates a tab for each window.



10 Click the tabs in the upper-left corner (below the Control panel) to control which document window to display.

11 Click the Close Document Window button on all the additional tabs, leaving one open. It doesn't matter which one remains open.

12 If necessary, choose View > Fit Page In Window.

Note: The tabs may display in reverse order on your screen.

Working with panels

InDesign provides many panels that provide quick access to commonly used tools and features. By default, various useful panels are docked at the right side of the screen. (Think of a dock as a collection of panels "glued" together.) The panels that display are different depending on the selected workspace, and each workspace remembers its panel configuration.

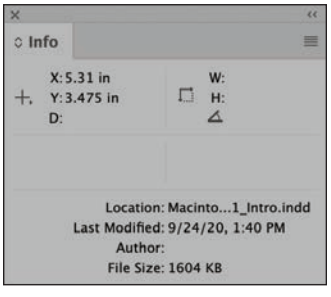
You can reorganize panels in various ways. Here, you'll experiment with opening, collapsing, grouping, stacking, and closing the default panels in the Advanced workspace. Feel free to experiment with panels as much as you want, as selecting Window > Workspace > Reset Advanced will restore the panels to their original locations.

Tip: As you become comfortable with InDesign, experiment with configuring the panels and workspace to best meet your needs. You will soon find out which panels you use the most, where you like to keep them, and what size is best for your needs. You may even prefer to store panels on a second monitor.

Opening and closing panels

To display a hidden panel, choose the panel name from the Window menu (or a submenu of the Window menu). Various text-formatting panels are available in the Type menu as well. If the panel name has a check mark, it is already open and in front of any other panels in its panel group. In this exercise, you will open, use, and close the Info panel, which provides feedback about anything you select in the document.

1. Choose Window > Info to open the Info panel.
2. In the Tools panel, select the Selection tool ( ).
3. Point at and click various objects on the page to view their details.



Tip: When a panel is floating, you can click its close box ( ) to close it.

4. Choose Window > Info again to close the Info panel.

   Many panels have keyboard shortcuts shown in the Window menu. The keyboard shortcuts let you toggle panels open and closed.

5. Press Ctrl+Alt+6 (Windows) or Command+Option+6 (macOS) to close the Control panel. Press the keyboard shortcut again to reopen it.

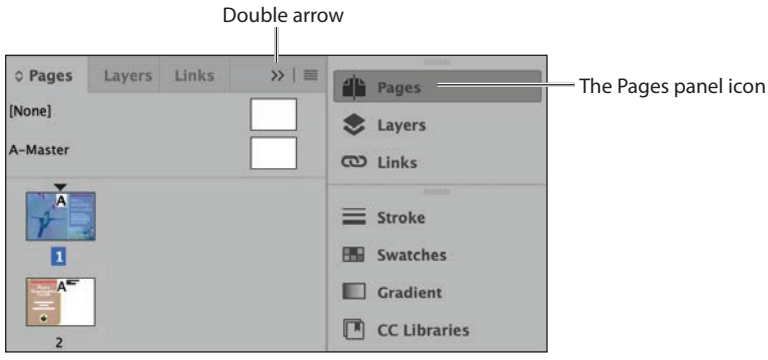
Expanding and collapsing panels

In this exercise, you will expand and collapse a panel, hide the panel names, and expand all the panels in the dock.

Tip: It may be difficult to remember all the techniques and terminology involved in managing the panels onscreen. The most important thing to remember is that you can always open and close a panel from the Window menu. Other than that, click around and experiment to see how the panels work.

1 In the dock to the right of the document window, click the Pages panel icon to expand the Pages panel.

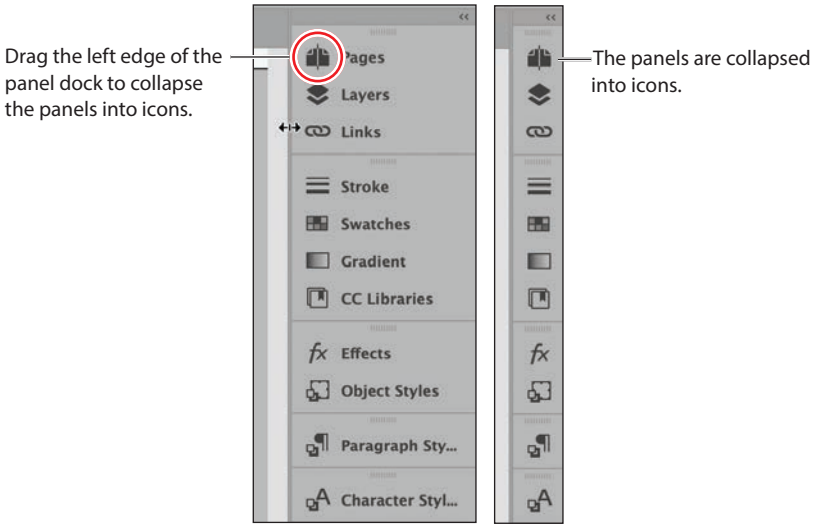
Clicking a panel icon is handy if you want to open a panel, use it briefly, and then close it.



2 When you've finished using the Pages panel, click the double arrow (») to the right of the panel names or click the Pages panel icon again to collapse the panel.

Tip: The double arrow button expands and collapses panels.

3 To reduce the width of the panel dock, drag the left edge of the panel dock to the right until the names are hidden.



4 To expand all the panels in the dock so that you can see all their controls, click the double arrow (») in the upper-right corner of the dock. For the next exercise, you will leave the panels expanded.

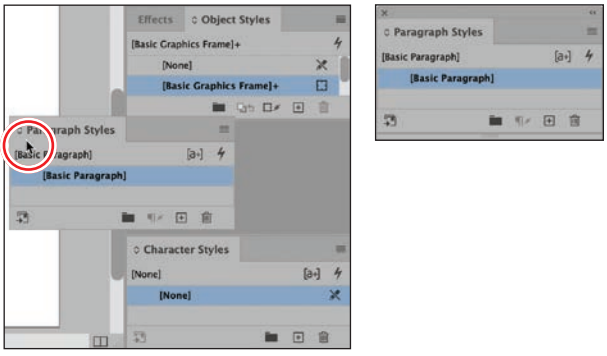
Rearranging and customizing panels

In this exercise, you will drag a single panel out of the dock to create a free-floating panel. Then, you will drag another panel into that panel to create a custom panel group. You will also ungroup the panels, stack them, and minimize them.

Note: If necessary, click the double arrow (<<) in the upper-right corner of the dock to expand all of the panels.

1 Locate the Paragraph Styles panel toward the bottom of the panels docked at the right. You will detach this from the dock to create a floating panel.

2 Click the Paragraph Styles tab in the dock, and then drag the panel away from the dock. This removes the panel from the dock.

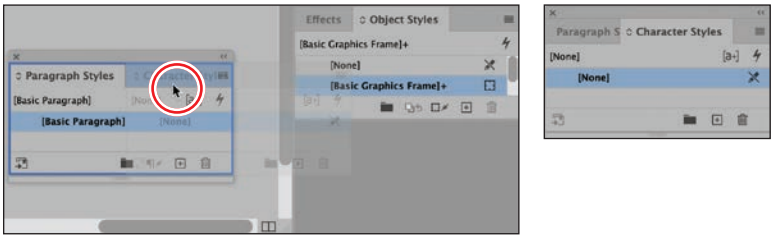


Now you will add the Character Styles panel to the floating Paragraph Styles panel to create a panel group.

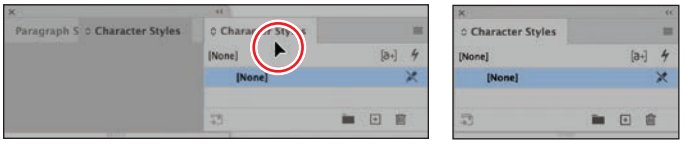
Tip: Grouping the Character Styles and Paragraph Styles panels can be helpful for formatting text. You can put this panel group in a handy location while leaving the remaining panels collapsed and out of the way.

3 Locate the Character Styles panel toward the bottom of the panel dock. Drag its tab into the gray area to the right of the Paragraph Styles panel tab.

4 Release the mouse button when the blue line appears along the perimeter of the Paragraph Styles panel.

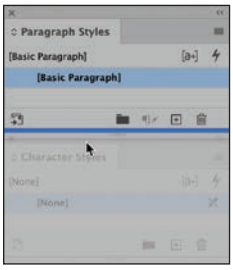


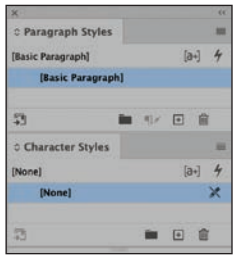
5 To ungroup the panels, drag one of the panel tabs out of the panel group.



You can also stack floating panels in a vertical arrangement. You'll try that now.

6 Drag the tab of the Character Styles panel to the bottom of the Paragraph Styles panel. Release the mouse button when a blue line appears.



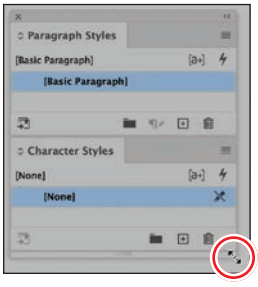


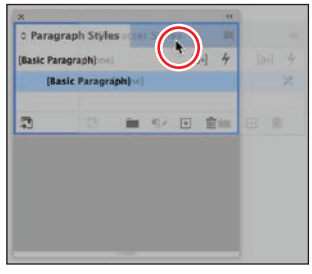
The panels are now stacked rather than grouped. Stacked panels attach vertically to each other. You can move the panels as a unit by dragging the topmost title bar. Next, you'll experiment with resizing the stacked panels.

▶ **Tip:** A detached panel is called a floating panel. To minimize or maximize a floating panel, double-click the panel name, or click the double arrow (⟪) to the left of the panel name.

7 Drag the lower-right corner of the panel stack to resize it.

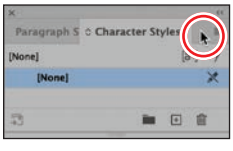
8 Regroup the panels by dragging the tab of the Character Styles panel up next to the Paragraph Styles panel tab.





▶ **Tip:** For floating panels, you can change the width and height by dragging the lower-right or lower-left corner, change the height by dragging the bottom, and change the width by dragging the left or right edge of the panel.

9 Minimize the panel group by double-clicking the gray area to the right of a panel's tab. Double-click the area again to expand the panels.



Leave the panels this way to be saved with a workspace in a later exercise.

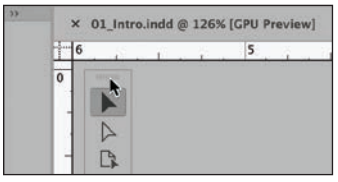
Moving the Tools panel and Control panel

When working in the Advanced workspace, it's likely that you will keep the Tools panel and the Control panel open all the time. However, as with all other panels, you can move them to best suit your own work style. Here, you will experiment with moving these two panels.

Tip: To undock the Tools panel, you can drag either the title bar or the gray dotted bar just below the title bar.

1 To undock the Tools panel and make it float in the workspace, drag the panel by its dotted bar ( ) to pull it into the pasteboard.

When the Tools panel is floating, it can be a two-column vertical panel, a single-column vertical panel, or a single-column horizontal row. The Tools panel must be floating (not docked) to display horizontally.



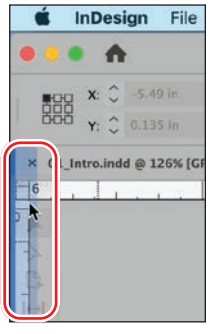
2 With the Tools panel floating, click the double arrow ( ) at the top of the panel.

The Tools panel becomes one horizontal row.

3 Click the double arrow ( ) in the Tools panel to turn it into a two-column vertical panel. Click the double arrow again to return to the default Tools panel.

4 To dock the Tools panel again, drag the dotted bar ( ) at the top of the Tools panel to the far-left edge of the screen.

5 Release the Tools panel when a blue line appears along the edge of the workspace.

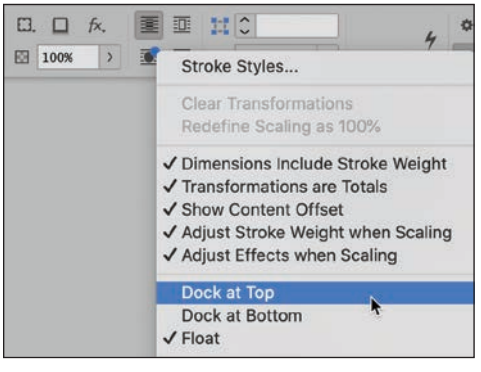


The Control panel can be moved if you don't like it docked at the top of the document window.

6 In the Control panel, drag the vertical dotted bar ( ) at the left into the document window. Release the mouse button to make the panel float.

Tip: You can also dock the Control panel by dragging the dotted bar until a horizontal blue line appears at the docking position.

7 To dock the panel again, click the Control panel menu button ( ) at the far right and choose Dock At Top.



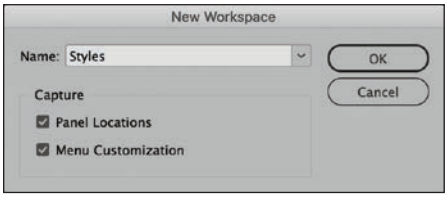
Customizing the workspace

A workspace is a configuration of panels and menus. (The configuration of document windows is not saved in workspaces.) InDesign provides a variety of workspaces for special purposes, such as Digital Publishing, Printing And Proofing, and Typography. You cannot modify the provided workspaces, but you can save your own. In this exercise, you will save the panel, from the previous exercises. In addition, you will customize the appearance of the interface.

Tip: To further customize the workspace, you can control which commands appear in the InDesign menus by choosing Edit > Menus. For example, you might prefer shorter menus for use on a smaller laptop screen, or you might want to streamline the commands available to a new user. You can save the menu customization with your saved workspaces.

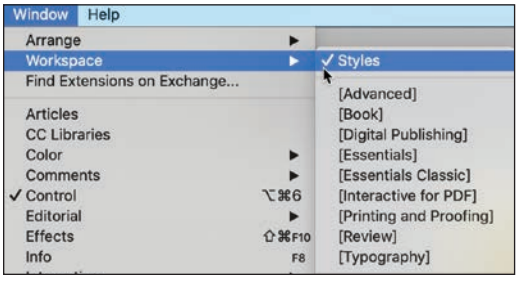
1 Choose Window > Workspace > New Workspace.

2 In the New Workspace dialog box, type **Styles** in the Name box. If necessary, select Panel Locations and Menu Customization.



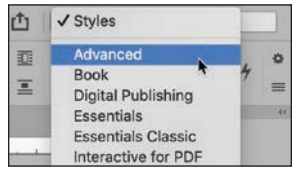
3 Click OK. If an alert displays indicating that the workspace already exists, click OK to replace the existing workspace.

4 Choose Window > Workspace to see that your custom workspace is selected.



5 The name of the selected workspace (Styles) also displays in the Workspace Switcher menu at the far right of the Control panel. Click this menu and select a different workspace.

6 Choose each workspace from the Window > Workspace submenu or the Control panel Workspace Switcher menu to see the different panel and menu configurations.



7 To restore the workspace, choose Window > Workspace > Advanced, and then choose Window > Workspace > Reset Advanced.

Changing the magnification of a document

▶ **Tip:** Keyboard shortcuts let you quickly change the view to 200%, 400%, and 50% magnification. In Windows, press Ctrl+2 for 200%, Ctrl+4 for 400%, and Ctrl+5 for 50%. In macOS, press Command+2 for 200%, Command+4 for 400%, and Command+5 for 50%.

Controls in InDesign let you view documents at any zoom level from 5% to 4000%. When a document is open, the current magnification percentage is displayed next to the filename in the document's tab.

In a document's title bar, the percentage next to the name indicates the zoom level.

Using the view commands

You can easily enlarge or reduce the view of a document by doing any of the following:

- Choose View > Zoom In to enlarge the display by one preset increment.
- Choose View > Zoom Out to reduce the display by one preset increment.
- Choose View > Fit Page In Window to center and display the page in the window.
- Choose View > Fit Spread In Window to center and display the current spread in the window. (A spread is multiple pages displayed side-by-side.)
- Choose View > Actual Size to display the document at 100%.
- Choose a percentage from the Zoom Level menu (in the lower-left corner of the document window) to enlarge or reduce the display by any preset increment.
- Type a percentage in the Zoom Level box by clicking in the box, typing the desired viewing percentage, and then pressing the Enter (Windows) or Return (macOS) key.

- Press Ctrl+= (Windows) or Command+= (macOS) to increase the magnification by one preset increment.
- Press Ctrl+– (Windows) or Command+– (macOS) to decrease the magnification by one preset increment.

Using the Zoom tool

In addition to the view commands, you can use the Zoom tool to magnify and reduce the view of a document. You might zoom in on a text frame to revise text, for example. In this exercise, you will experiment with the Zoom tool.

Tip: When clicking with the Zoom tool to increase the zoom level, target the item you want to zoom in on to avoid zooming in to random areas of a page.

1. Choose View > Actual Size to view the document at 100%.
2. Select the Zoom tool ( ) in the Tools panel and position it near the hummingbird on the left side of page 1. Notice that a plus sign appears in the center of the Zoom tool.
3. Click three times. The view changes to the next preset magnification, centered on the point where you clicked. The preset magnifications include 5%, 12.5%, 25%, 50%, 75%, 100%, 125%, 150%, 200%, 300%, 400%, 600%, 800%, 1200%, 1600%, 2400%, 3200%, and 4000%.

Now you'll reduce the view.

4. Position the Zoom tool over the hummingbird image and hold down the Alt (Windows) or Option (macOS) key. A minus sign appears in the center of the Zoom tool.
5. While holding the Alt or Option key, click three times to reduce the view scale.

   To magnify a specific area, you can drag the Zoom tool around that area. The percentage by which the area is magnified depends on the size of the marquee: the smaller the marquee, the larger the degree of magnification.
6. Scroll as necessary to see the text starting with "Learn to select."

Note: If you have a Mac with a compatible graphics processing unit (GPU) card, your Zoom tool offers Animated Zoom. See the sidebar on the next page for details.

7 With the Zoom tool still selected, hold down the mouse button to drag a marquee around the text frame, and then release the mouse button.

8 Choose View > Fit Page In Window.

9 Because the Zoom tool is used frequently during the design and editing processes, you can temporarily select it from the keyboard at any time without deselecting the tool you are using. To try this:

- Click the Selection tool ( ) in the Tools panel and position it anywhere in the document window.
- Hold down Ctrl+spacebar (Windows) or Command+spacebar (macOS) so that the Selection tool icon becomes the Zoom tool icon, and then click the hummingbird to magnify the view.
- Hold down Ctrl+Alt+spacebar (Windows) or Command+Option+spacebar (macOS) to reduce the view.
- When you release the keys, the pointer returns to the Selection tool.

10 Choose View > Fit Page In Window to center the page again.

Note: Your Windows or macOS system preferences may override some InDesign keyboard shortcuts. If a shortcut is not working, consider revising your system's keyboard shortcut preferences.

Note: In macOS, hold the spacebar first and then add the Command key. Otherwise, Command+spacebar activates Siri.

Using Animated Zoom

If you have a Mac with a compatible graphics processing unit (GPU) card, InDesign provides enhanced view features. The Display Performance (View menu) is set to High Quality and Animated Zoom (InDesign > Preferences > GPU Performance) is enabled by default.

Animated Zoom offers smooth, animated displays when using the Zoom tool:

- Press and hold: Zoom in to the center.
- Press Option and hold: Zoom out from the center.
- Press and drag to the right: Zoom in.
- Press and drag to the left: Zoom out.
- Press Shift while dragging: Access standard marquee zoom.

You can disable this feature by selecting View > Preview On CPU.

Navigating through a document

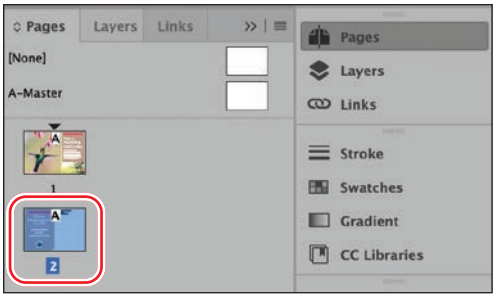
InDesign offers several different ways to navigate through a document, including using the Pages panel, the Hand tool, the Go To Page dialog box, scroll bars, and controls in the document window. As you work with InDesign, you will find that you prefer certain methods over others. Once you find a method you like, remember any shortcuts to make that method easier.

Tip: To navigate pages, you can also use commands in the Layout menu: First Page, Previous Page, Next Page, Last Page, Next Spread, and Previous Spread.

Navigating pages

You can navigate document pages using the Pages panel, the page icons at the bottom of the document window, the scroll bars, or a variety of other methods. The Pages panel displays an icon for each page in the document. Double-clicking any page icon or page number in the panel brings that page or spread into view. In this exercise, you will experiment with turning pages.

1. Click the Pages panel icon to expand the Pages panel, if necessary.
2. Double-click the page 2 icon to display it in the document window.



3. Double-click the page 1 icon to center the first page in the document window.
4. To return to the second page of the document, use the menu in the lower-left corner of the document window. Click the down arrow, and choose 2.

   You will now use the arrow buttons at the bottom of the document window to display a different page.

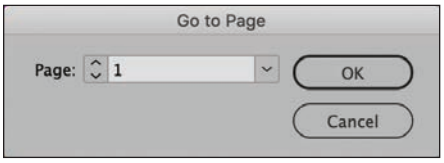
Note: When View > Fit Spread In Window is selected, the navigation controls in the document window are for spreads rather than pages.

5. Click the Previous Page button (left-facing arrow) next to the Page Number box to switch pages until the first page is displayed.
6. Click the Next Page button (the right-facing arrow) next to the Page Number box until the second page is displayed.

▶ **Tip:** The keyboard shortcut for Layout > Go To Page is Ctrl+J (Windows) or Command+J (macOS).

7 Choose Layout > Go To Page.

8 In the Page box, type **1** or select 1 from the menu. Click OK.



Using the Hand tool

The Hand tool in the Tools panel lets you "push" the pages of a document around until the area you want to view is visible. In this exercise, you will experiment with the Hand tool.

▶ **Tip:** When you're using the Selection tool, you can press the spacebar to temporarily access the Hand tool. When you're using the Type tool, press the Alt (Windows) or Option (macOS) key to use the Hand tool.

1 Choose 400% from the Zoom Level menu on the lower-left corner of the document window.

2 Select the Hand tool ( ).

3 Drag in any direction to move the page around, and then drag upward in the document window to display page 2.

4 With the Hand tool still selected, click the page and hold the mouse button down to power zoom.

5 Drag to zoom into the area of the page you want to view.

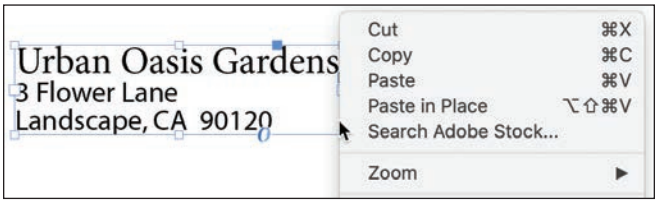
6 Double-click the Hand tool in the Tools panel to fit the page in the document window.

Using context menus

Context menus display commands relevant to the active tool or selection. To display a context menu, position the pointer over a selected object or anywhere in the document window and click with the right mouse button or press Control and hold down the mouse button (macOS).

1 Using the Selection tool ( ), click any object on the page, such as the text frame containing the postcard's return address starting with "Urban Oasis Gardens."

2 Right-click the text frame. Note the available options; a partial list is shown here.



3 Continue to right-click different types of objects on page 1 and page 2 to display their context menus to see the available commands.

4 When you're finished reviewing the context menus, use the scroll bars to return to page 2, if necessary.

Tip: You can display a context menu when entering or editing text. The Type context menu lets you insert special characters, check spelling, and perform other text-related tasks. For example, if you need to enter a copyright symbol (©), right-click and select Insert Special Character > Symbols > Copyright Symbol.

Using panel menus

Most panels have additional panel-specific options. Clicking the panel menu button displays a menu with additional commands and options for the selected panel.

In this exercise, you will change the display of the Swatches panel.

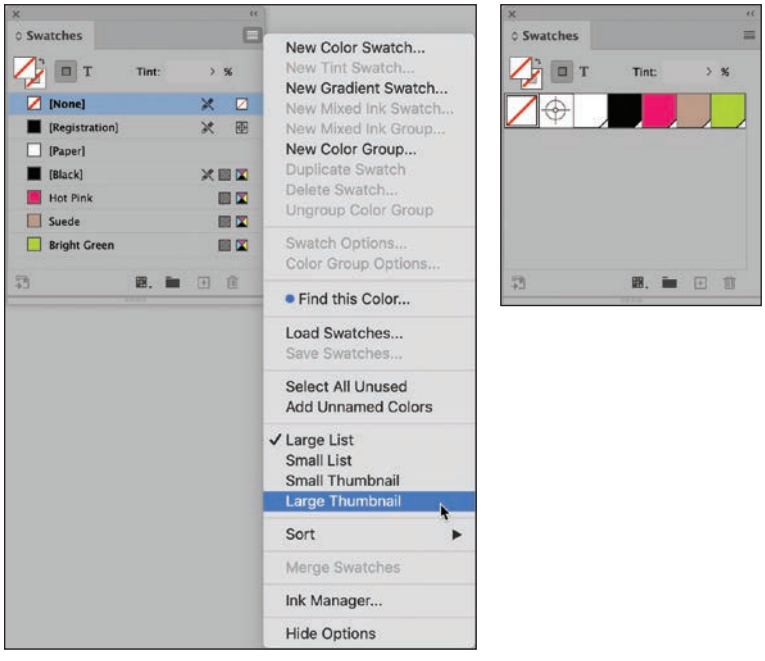
1 Locate the Swatches panel on the dock. (If necessary, choose Window > Color > Swatches to display it.) Drag the Swatches panel out of the dock at the right to create a free-floating panel.

2 If necessary, click the double arrow ( ) in its title bar to expand the Swatches panel.

3 In the upper-right corner of the Swatches panel, click the panel menu button ( ) to display the panel menu.

You can use the Swatches panel menu to create new color swatches, load swatches from another document, and more.

4 Choose Large Thumbnail from the Swatches panel menu to see how a panel's display can be customized. Note the other options on the menu as well.



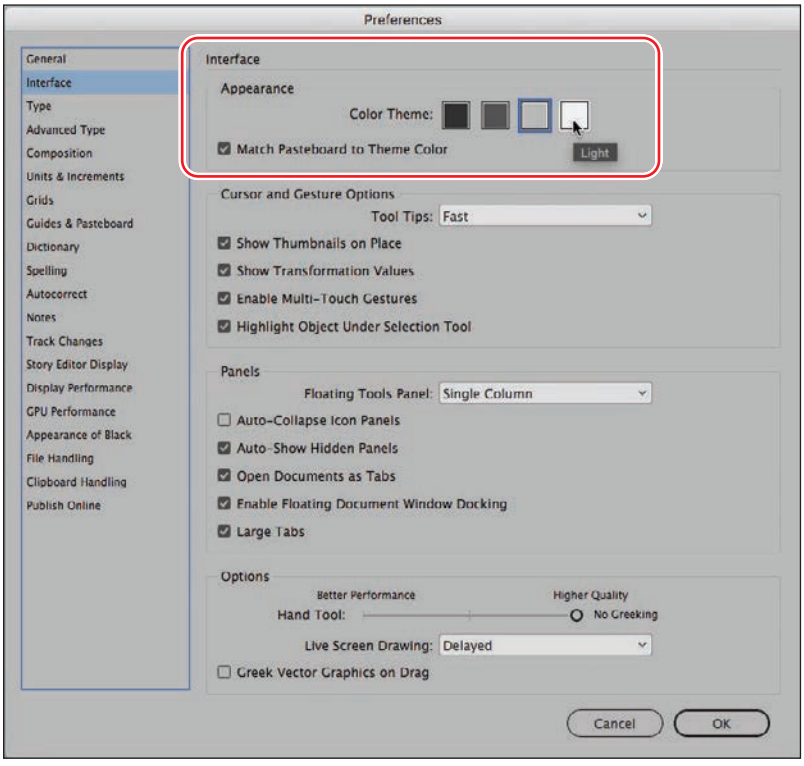
Modifying interface preferences

Note: The screen captures in this book show the Medium Light interface. You can use any color theme that you prefer.

You can customize the InDesign interface by changing the overall color, the way various tools work, and how the panels are configured through preferences. Some settings in the Preferences dialog box affect the application (InDesign itself), whereas others affect only the active document. If you change the document-specific preferences while no documents are open, the changes affect all new documents (without affecting existing documents). Here, you will look at Interface preferences that affect how InDesign works with all documents.

1 Choose Edit > Preferences > Interface (Windows) or InDesign > Preferences > Interface (macOS) to customize the appearance of InDesign.

2 In the Appearance area, for Color Theme click the Light box at the far right.



3 Experiment with the other options, and then leave the setting at your preference. (Medium Dark is the default.)

4 In the Preferences dialog box, click through the list at the left to see other options for customizing InDesign. For example, the Units & Increments tab lets you specify the measurement system (points, picas, inches) on the ruler.

5 When you are finished reviewing Preferences, click OK.

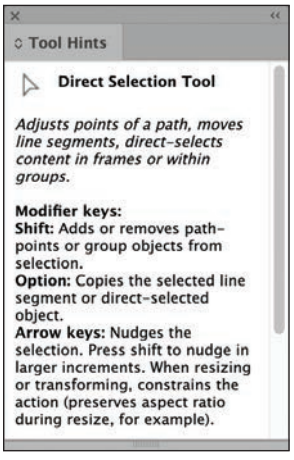
Congratulations! You've learned the basics of InDesign interface elements, such as tools and panels, that you will use to complete the lessons in this book. Revisit this chapter as necessary for a refresher on panel management, zooming, and more.

Exploring on your own

▶ **Tip:** For complete and up-to-date information about using InDesign panels, tools, and other application features, use the Help menu.

Using the 01_Intro.indd document, continue to explore the tools, panels, navigation, and magnification options.

- Choose Window > Utilities > Tool Hints to display information about the selected tool. Select various tools to learn more about them.



- Choose Window > Editorial > Notes to display the Notes panel group, which includes the Assignments panel and the Track Changes panel. You can use these panels to collaborate on documents.
- Learn more about existing key commands and how you can change them by exploring the Keyboard Shortcuts dialog box (Edit > Keyboard Shortcuts).
- Review the menu configurations and how you can edit them in the Menu Customization dialog box (Edit > Menus).
- Try organizing your panels to meet your needs, and create your own workspace by choosing Window > Workspace > New Workspace.
- Select objects and use the Properties panel or the Control panel to change formatting.
- Using the Type tool (T), edit and format the text.

Review questions

1 What are some ways you can change the magnification (zoom level) of a document?

2 How do you select tools in InDesign?

3 What are three ways to display a panel?

4 How do you create a panel group?

Review answers

1 You can choose commands from the View menu to zoom in, zoom out, fit the page to the window, and more. You can also use the Zoom tool in the Tools panel and click or drag over a document to enlarge or reduce the view. In addition, you can use keyboard shortcuts to increase or reduce the magnification. Finally, you can also use the Zoom Level box on the lower-left corner of the document window.

2 You can click to select a tool in the Tools panel. Or, if the Type tool is not selected, you can press the tool's keyboard shortcut. For example, you can press V to select the Selection tool from the keyboard; press and hold the keyboard shortcut to temporarily select the tool. Select hidden tools by positioning the pointer over a tool in the Tools panel and holding down the mouse button. When the menu appears, select the tool. Finally, you can Alt-click (Windows) or Option-click (macOS) a hidden tool.

3 To make a panel appear, click its icon, click its tab, or choose its name from the Window menu. For example, choose Window > Object & Layout > Align. You can also access type-specific panels from the Type menu. For example, choose Type > Character.

4 Drag a panel off the dock to create a free-floating panel. Drag the tab of any other panel into the tab bar of the new, free-floating panel. A panel group can be moved and resized as one panel.

2 GETTING TO KNOW INDESIGN

Lesson overview

In this lesson, you'll learn how to do the following:

- View layout aids.
- Type and style text.
- Import text and thread text frames.
- Import a graphic.
- Move, rotate, fill, and stroke (outline) an object.
- Automate formatting with paragraph, character, and object styles.
- Check on potential production issues with the Preflight panel.
- Preview a document in Presentation mode.

This lesson will take about 60 minutes to complete. To get the lesson files used in this chapter, download them from the web page for this book at www.adobepress.com/InDesignCIB2021. For more information, see "Accessing the lesson files and Web Edition" in the Getting Started section at the beginning of this book.