



Adobe InDesign CS5 Tutorial

Adobe InDesign CS5 is a page-layout software that takes print publishing and page design beyond current boundaries. Replacing popular software such as PageMaker and Quark Express, InDesign is a desktop publishing program that incorporates illustration capabilities into its interface. It also allows for cross platform interaction with Illustrator, Photoshop, and Acrobat.

NOTE: This tutorial is fairly comprehensive in that it discusses the most common aspects of InDesign and has been developed to take beginners through the software from start to finish.

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1. GETTING STARTED

Begin by opening Adobe InDesign CS5.

On a PC, click **Start > Programs > Adobe > InDesign CS5**, or click on the InDesign short cut on the desktop.

On a Mac, click **Macintosh HD > Applications > Adobe InDesign CS5**, or click the InDesign icon in the Dock. (Figure 1)

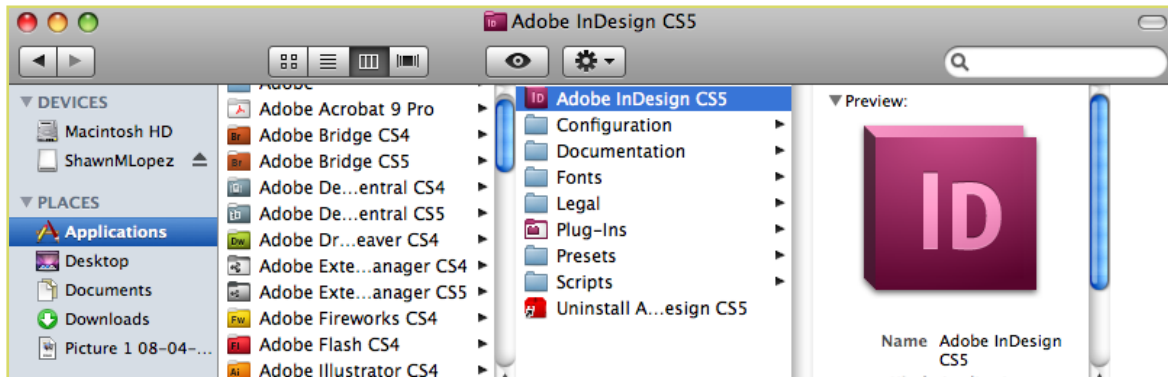


Figure 1. Navigation to InDesign CS5 on a Mac.

2. SETTING UP THE DOCUMENT

Setting up your document correctly from the start will make your job much easier as you work through your project. This will require some advanced planning.

1. To create a new document, click **File > New > Document**. This will open the **Document Setup** dialog box. Here you will be able to set up the correct page size, margins, and page columns for your document. (Figure 2)

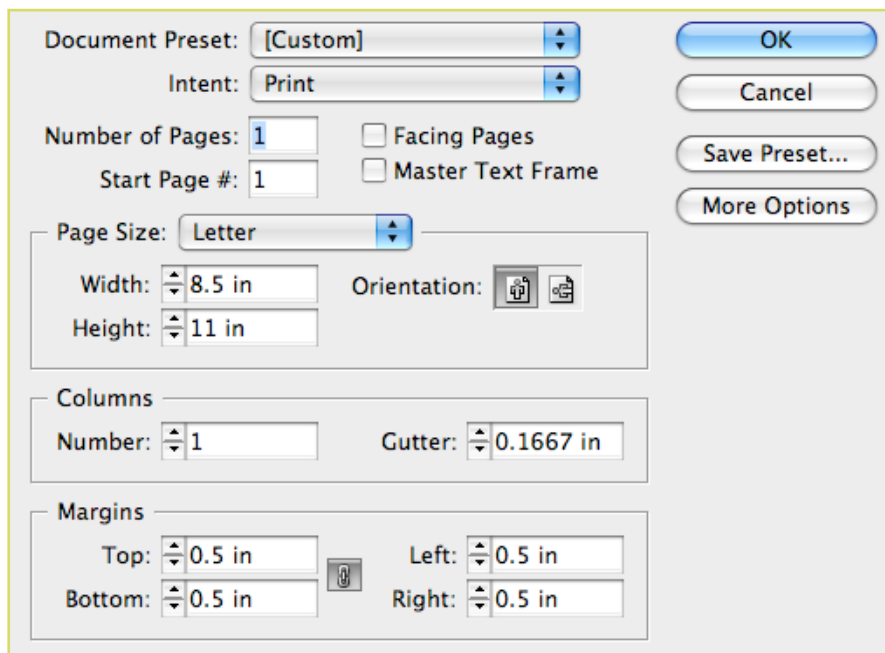


Figure 2. Opening a new document in InDesign.

2. SETTING UP THE DOCUMENT CONT.

Options include, but are not limited to:

Number of Pages

Type a value for the total number of pages for this document.

Facing Pages

Select this option to make left and right pages face each other in a double-page spread.

Deselect this option to let each page stand alone, such as when you plan to print on both sides of a sheet of paper or want objects to bleed in the binding.

Master Text Frame

Select this option to create a text frame the size of the area within the margin guides, matching the column settings you specified. The master text frame is added to the master.

Page Size

Choose a page size from the menu, or type values for Width and Height. Page size represents the final size you want after bleeds or trimming other marks outside the page. There are presets for common sizes such as letter, legal, and tabloid.

Orientation

Click the Portrait (tall) or Landscape (wide) icons. These icons interact dynamically with the dimensions you enter in **Page Size**. When Height is the larger value, the portrait icon is selected. When Width is the larger value, the landscape icon is selected. Clicking the deselected icon switches the Height and Width values.

NOTE: The default unit of measurement in InDesign is pica (p0). If you type a value into the Width or Height text fields and use the abbreviation for inches (in), InDesign will automatically convert it.

Bleed

After clicking **More Options**, the bleed area is used to align objects that you want to extend all the way to the trim line of your printed document.

Slug

After clicking **More Options**, the slug area is used for instructions to the printer, sign-off forms, or other information related to your document. The slug area is discarded when the document is trimmed to its final page size.

2. When you have entered all of your document settings, click **OK**.

NOTE: If you incorrectly enter information in the Document Setup dialog box, or if you need to adjust any of this information while you are working, you can make changes at any time by clicking **File > Document Setup**.

3. TOOLBOX

If you used Adobe Photoshop or Adobe InDesign before you should be familiar with the toolbox in InDesign CS5 as it shares some of the tools from these applications. If you are a novice user of Adobe products you should keep in mind that you might not need to use all the tools. In this tutorial, only the basic tools will be discussed in depth.

3. TOOLBOX CONT.

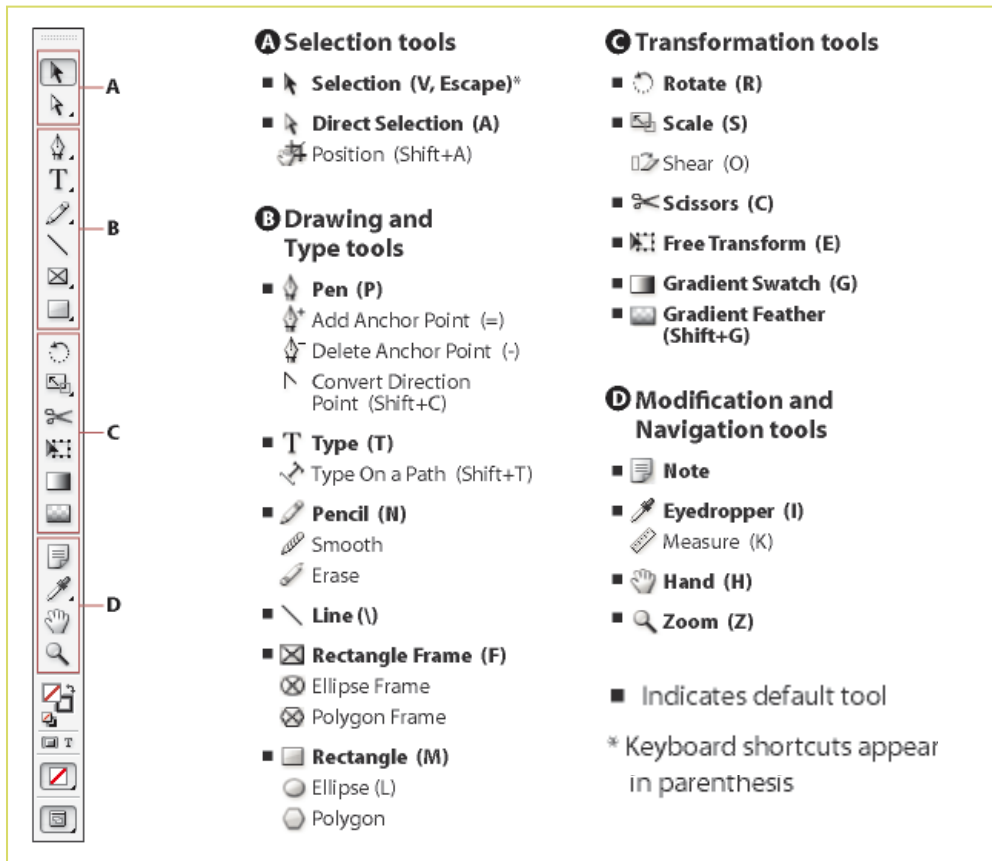


Figure 3. Tools in InDesign.

Some tools in the toolbox have additional tools linked to them. These tools have small black triangles in the right-hand corner. To view the additional tools click and hold down on any tool that has a black triangle in the corner. (Figure 4)

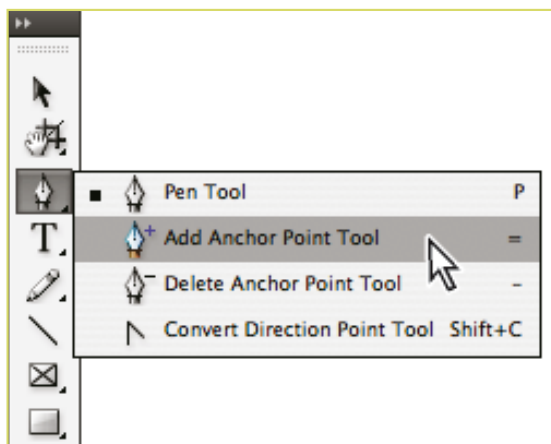
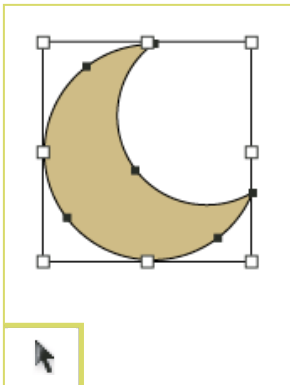


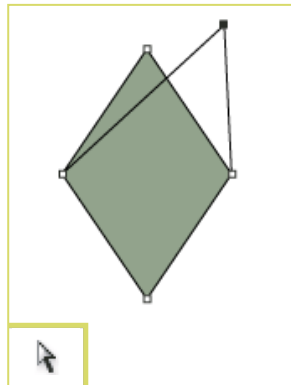
Figure 4. Extra Tools in InDesign.

3. TOOLBOX CONT.

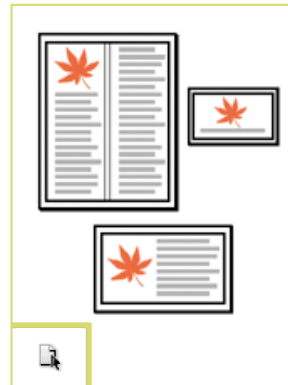
SELECTION TOOLS



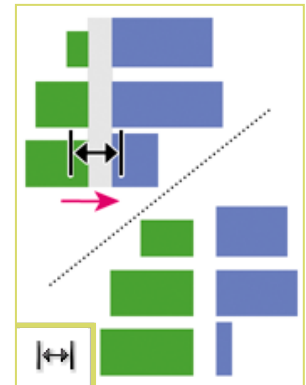
Selection tool lets you select entire objects.



Direct Selection tool lets you select points on a path or contents within a frame.

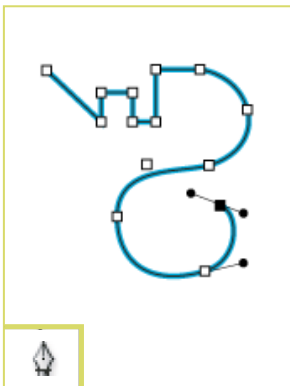


Page tool lets you create multiple page sizes within a document.

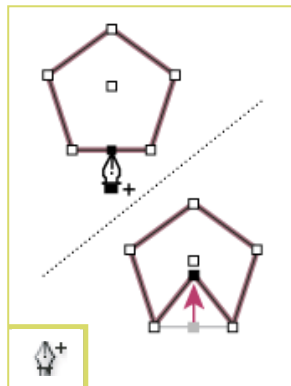


Gap tool lets you adjust the space between objects.

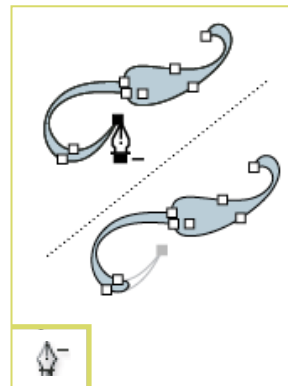
DRAWING AND TYPE TOOLS



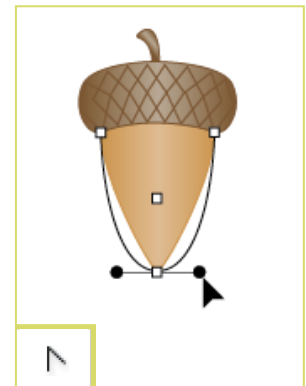
Pen tool lets you draw straight and curved paths.



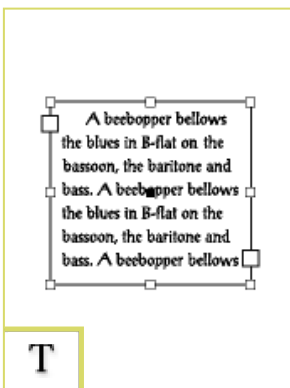
Add Anchor Point tool lets you add anchor points to a path.



Delete Anchor Point tool lets you remove anchor points from a path.



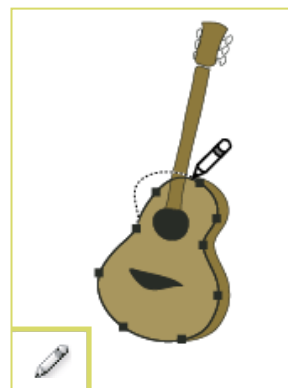
Convert Direction Point tool lets you convert corner points and smooth points.



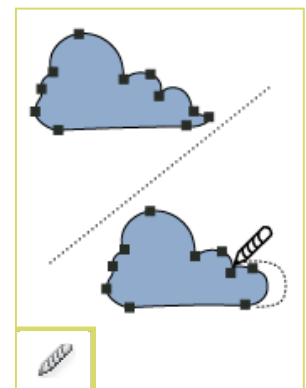
Type tool lets you create text frames and select text.



Type on a Path tool lets you create and edit type on paths.



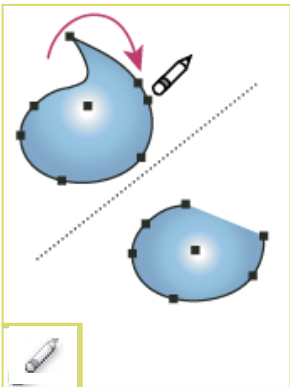
Pencil tool lets you draw a freeform path.



Smooth tool lets you remove excess angles from a path.

3. TOOLBOX CONT.

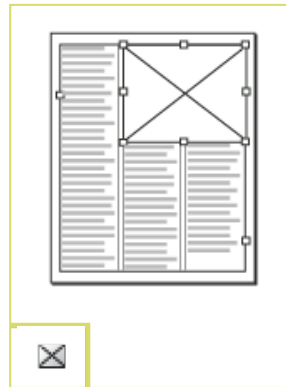
DRAWING AND TYPE TOOLS CONT.



Erase tool lets you delete points on a path.



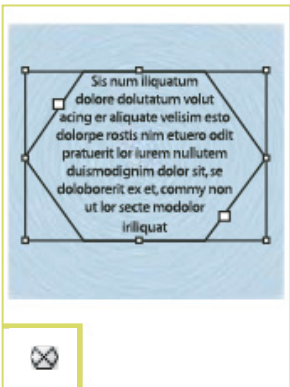
Line tool lets you draw a line segment.



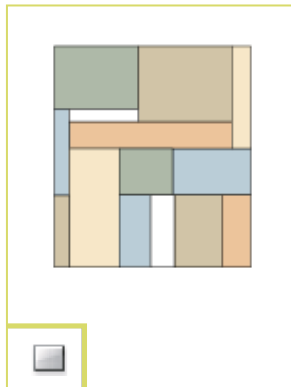
Rectangle Frame tool lets you create a square or rectangle placeholder.



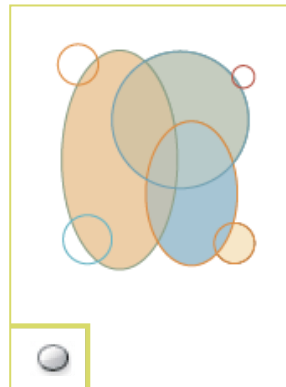
Ellipse Frame tool lets you create a circle or oval placeholder.



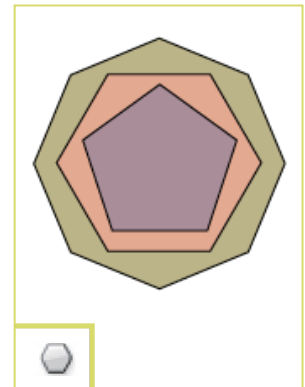
Polygon Frame tool lets you create a multi-sided shape placeholder.



Rectangle tool lets you create a square or rectangle.



Ellipse tool lets you create a circle or oval.

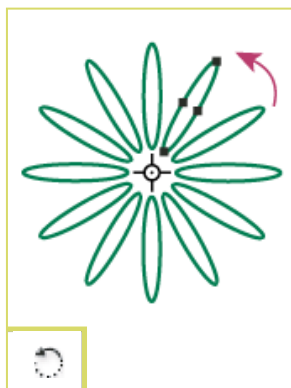


Polygon tool lets you create multi-sided shape.

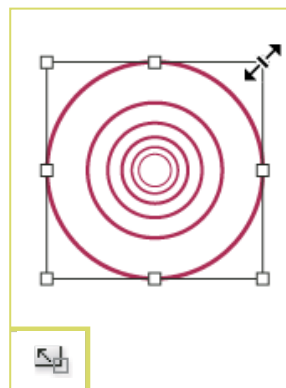
TRANSFORMATION TOOLS



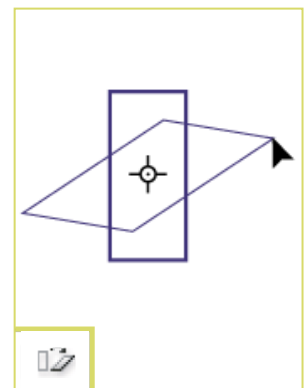
Free Transform tool lets you rotate, scale, or shear an object.



Rotate tool lets you rotate objects around a fixed point.



Scale tool lets you resize objects around a fixed point.



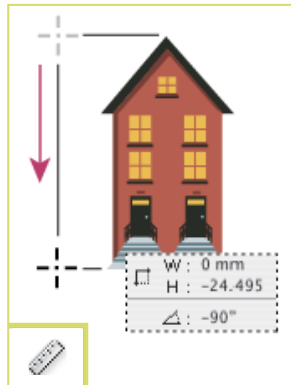
Shear tool lets you skew objects around a fixed point.

3. TOOLBOX CONT.

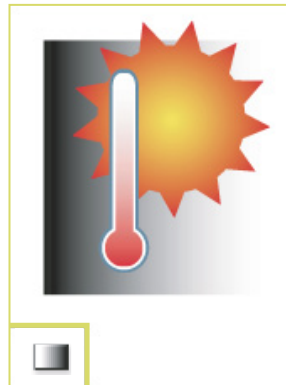
MODIFICATION AND NAVIGATION TOOLS



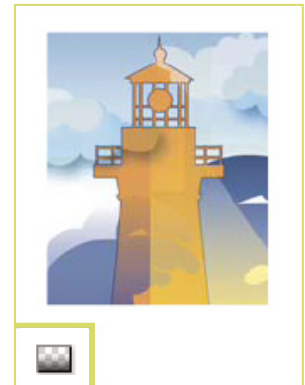
Eyedropper tool lets you sample color or type attributes.



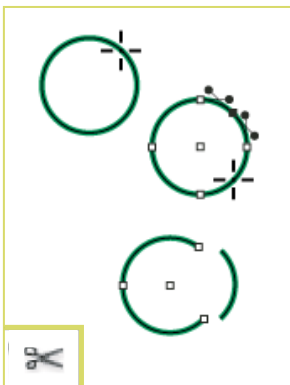
Measure tool measures the distance between two points.



Gradient Swatch tool lets you insert and adjust gradients



Gradient Feather tool lets you fade an object into the background.



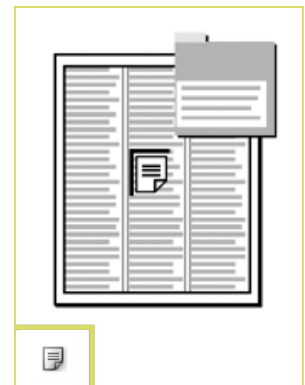
Scissors tool cuts paths at specified points



Hand tool moves the page view within the document window.



Zoom tool adjusts the view magnification in the document window.



Note tool lets you add comments.

4. ORGANIZING THE DOCUMENT

Working in InDesign can sometimes call for mathematical precision in the layout of the document. This section provides tips on how you can use the available **Rulers**, **Guides**, and **Column Specifications** to make your final output precise with the placement of your text and graphics exactly where you want them.

Using the **Zoom Tool** in conjunction with the Guides and Rulers is helpful because it allows you to focus in on specific areas of your documents to make the placement of your text and graphics as accurate as possible. You can access the Zoom Tool by selecting it from the Tool Box (Fig. 3)

The following sections within this tutorial explain:

- Column Specifications (Page 9)
- Rulers (Page 9)
- Guides (Page 10)

4. ORGANIZING THE DOCUMENT CONT.

COLUMN SPECIFICATIONS

To insert columns into your document click **Layout > Margins and Columns**.

1. Enter the number of columns you would like in the **Number of Columns** text field (Fig. 5).
2. Enter the space (in inches) that you would like in between your columns in the **Gutter** text field.
3. Make sure the chain image is linked and not broken if you would like InDesign to automatically make all the settings the same throughout the rest of your document.

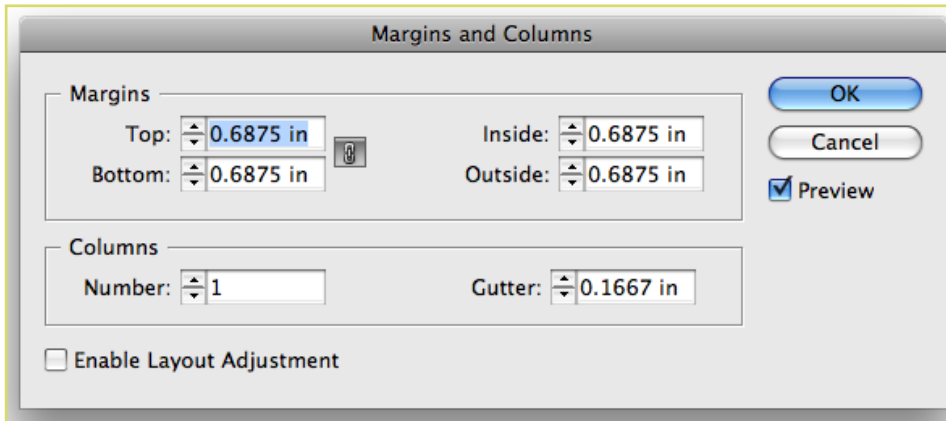


Figure 5. Margins and Columns

RULERS

Rulers are used to measure the placement of texts and images in your document. The rulers measure in inches, starting at “0”, and run horizontally and vertically from the top left corner of your document.

If the Rulers are not displayed, click **View > Show Rulers** (Fig. 6). Or, if the Rulers are being displayed, and you want to get rid of them, go to **View > Hide Rulers**. Clicking and dragging on the box where the horizontal and vertical rulers meet adjusts the placement of the ruler.

NOTE: The rulers must be shown in order to draw Guides, which are described in the next section.

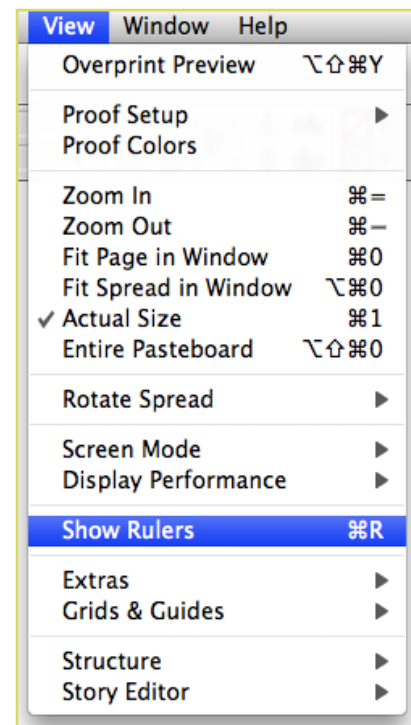


Figure 6. Rulers

4. ORGANIZING THE DOCUMENT CONT.

GUIDES

Guides are temporary horizontal and vertical lines that you can set up within your document to produce page layout with mathematical precision. They are not actually drawn into your document; they exist only on-screen to help you with your layout. Guides are useful because they help keep all parts of the document aligned properly, and they assist when measuring with the rulers. The Rulers must be shown in order to insert Guides.

Inserting Guides

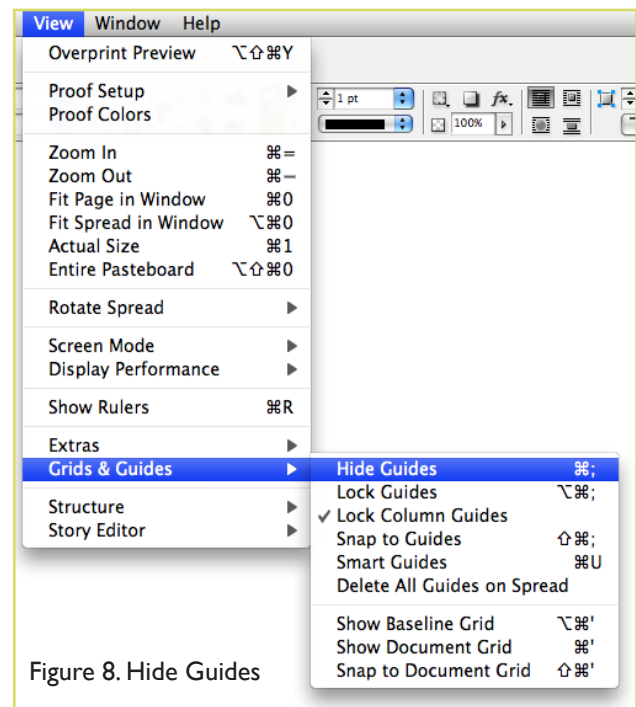
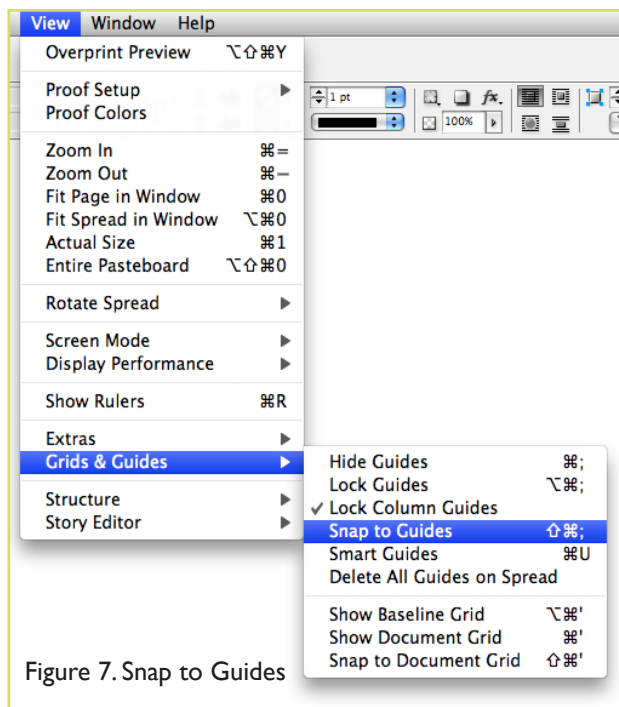
To insert a Guide, place your pointer on the Horizontal (or Vertical) ruler at the top of your document. Click and drag down onto the document where you would like your guide to be. You should notice a dotted line that correlates with the movement of your pointer. Measure the distance you are pulling your Guide down at by using the Vertical (Horizontal) ruler on the left of your document. The Guide will appear as a thin aqua line. If you do not like where you placed your Guide, you can move it to another part of the document by clicking and dragging it, or, you can remove it completely by dragging it off of the document.

“Snap to” Guides

Snapping to a Guide is like “magnetizing” it. If you drag an image or element near a Guide (within a fraction of an inch), the image or element will lock into place with the Guide. To turn snapping on or off, click **View > Grids and Guides > Snap to Guides** (Fig. 7).

Hiding Guides

If you would like to view your document without the aid of the Guides, you can hide them temporarily by going to **View > Grids and Guides > Hide Guides** (Fig. 8).



INSERTING AND FORMATTING TEXT

Now that you have a basic understanding of setting up a document and using the **Tool Box**, you can begin inserting text. Using the **Text Tool (T)** (Fig. 3), click onto your page to enable the text cursor. Don't be discouraged if the cursor does not line up exactly where you want to place your text – you can move and format your text later. Begin typing your content. Once you have your raw text on the page you can begin manipulating it to your liking.

Change from the **Text Tool** to the **Pointer Tool** and click over your text. You will notice that your text has been placed into a “box” of sorts. This is called an **Element**. Many objects and all of your text must be within an **Element**; there is no “freestanding” text in an InDesign document as you might find in a Microsoft Word document.

Using the **Pointer Tool**, you can move the **Element** of text around to anywhere you like on the page. Using the “grippers” on the corners of the **Element**, you can adjust the width and length of the **Element**. If you do not specify a length for the **Element**, it will expand according to the length of your text, however, if you adjust the length of the **Element** to be smaller than your text, your text will not be visible. A red tab below the **Element** indicates that there is more content within the **Element** that is not visible (Fig. 9).

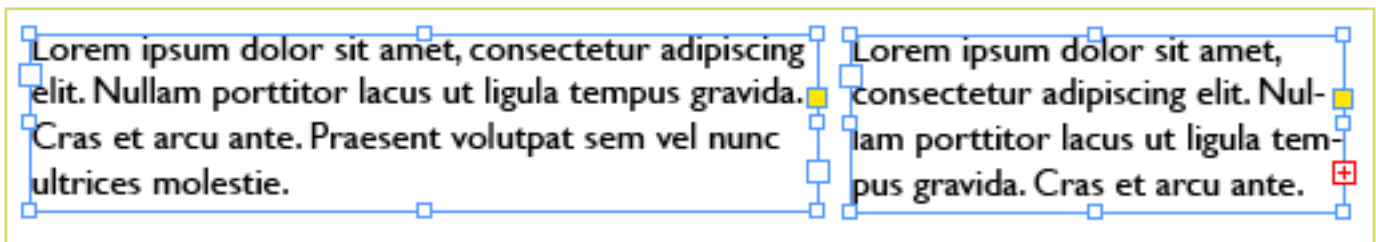


Figure 9. Left box shows text that fits in the **Element**. Right box shows that all text is not showing in the **Element**.

TYPE AND PARAGRAPH MENU

A common way to format and manipulate your text is to use the **Type Menu** at the top of the screen. InDesign CS4 placed only the basic items in this area, however CS5 adds all the advanced features, as well as access to the **Paragraph menu**. When the **Type Tool** is selected, the **Control Palette** should appear at the top of the screen. If it is not, click **Window > Control**. At the extreme left hand side of the palette are the two buttons that let you switch back and forth between **Type** and **Paragraph** controls.



Figure 10. **Type Palette**

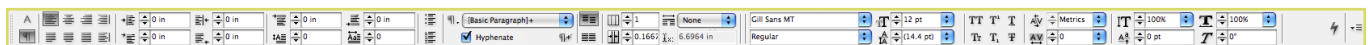


Figure 11. **Paragraph Palette**

USING COLORS

InDesign includes thousands of color options as well as the ability to mix and create your own colors. After opening a new document, the Colors Palette window should appear on the right-hand side of the screen. If it is not there, click **Window > Color**.

InDesign includes 10 default color options within the Swatches Palette (Fig. 12). These colors are selected from the two common color models: RGB and CMYK. (Use RGB colors if your output will be on a computer or TV screen. Use CMYK colors for print documents.)

To mix custom colors, open the Color Palette. Depending on the color mode, you're using, it will open in RGB (Fig. 13) or CMYK (Fig. 14). Mix hues using the slider bars. To add your custom color to the Swatches Palette, click **Add to Swatches**. You can also remove colors from the Swatches Palette by clicking and dragging.

The new swatch will appear in the Swatches Palette with the default name set to reflect the color mixture. For example, in Figure 12, pure Cyan in CMYK mode is listed as C=100 M=0 Y=0 K=0. One can easily change this to something more descriptive by double-clicking the swatch and simply renaming it.

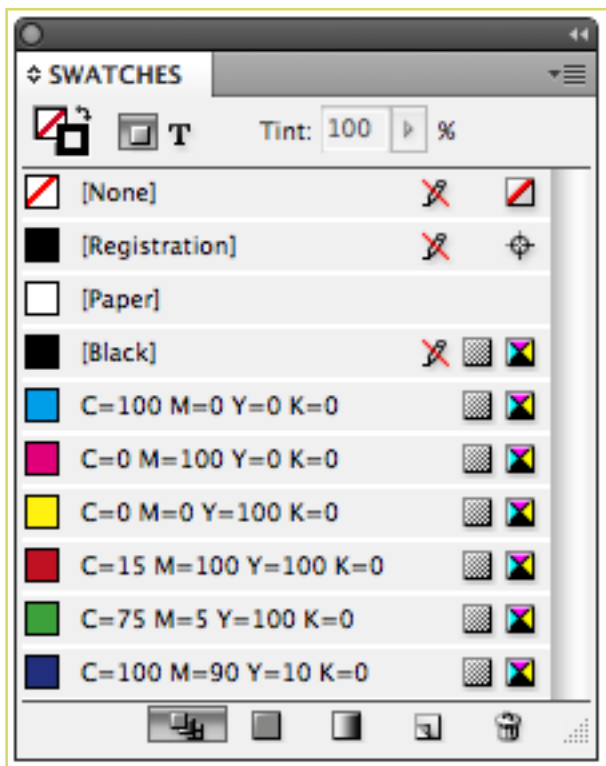


Figure 12. Default Swatches Palette

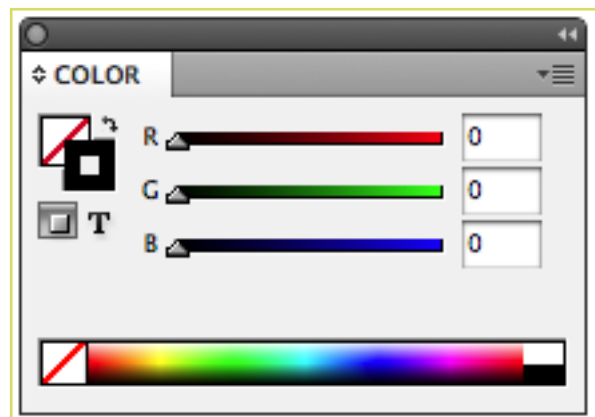


Figure 13. RGB color palette set to black

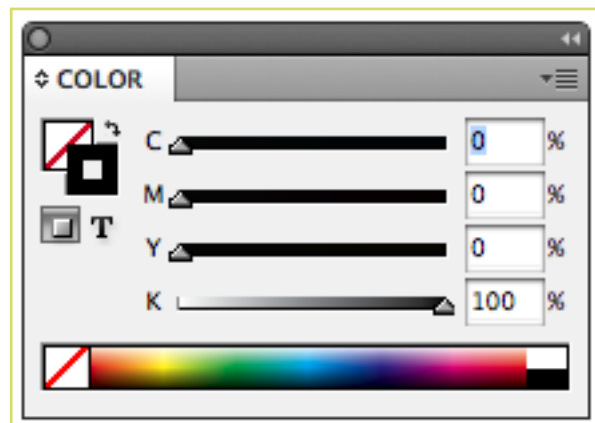


Figure 14. CMYK color palette set to black

WORKING WITH OBJECTS

Now that you have learned how to insert and edit text Elements, you need to understand how to work with other kinds of objects within your document. Nearly every InDesign document will contain text, and/or graphics. Using the three together takes thorough knowledge of InDesign's capabilities.

For the purposes of this tutorial, it is important to understand the kind of “objects” to which this tutorial refers:

- Text (Element) - A block of text within a defined “text box” (discussed in a previous section).
- Image - A picture file with one of the following extensions: .jpg, .gif, .tif, .pct, .bmp, .ai, .pdf, or .png, created in another program such as MS Excel or Photoshop.
- Graphic - Vector illustration created directly in InDesign using the provided pen or other path tools.

The following sections offer an in depth explanation of how to insert and adjust Images, Graphics, and Elements within your document.

- Links (Page 15)
- Placing Images (Page 15)
- Enabling Text Wraps (Page 16)
- Layers and Arranging (Page 17)
- Grouping (Page 18)

LINKS

InDesign is primarily a linking device; it can create simple graphics, but it's strength lies in the way it assembles disparate elements into a cohesive document. As a general rule, when inserting images into your document, you should never use the “copy & paste” technique. Instead, save your image files in the same folder as your InDesign document, and “link” them into the document (discussed in the next section). You can view the source location of the images that are linked into your document, as well as other important data such as colorspace and filetype, by going to the Links Palette (Fig. 15). To view the palette, go to **Window > Links** (Fig. 16).

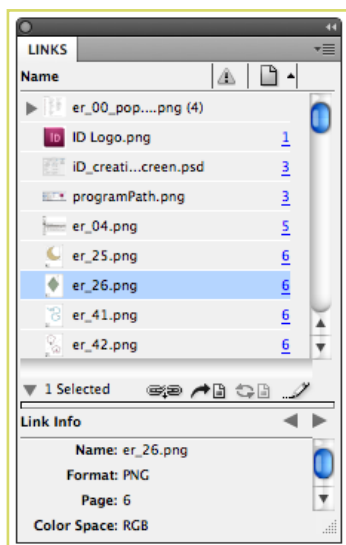


Figure 15. Links palette

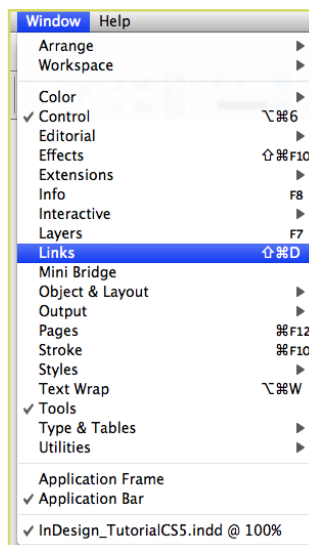


Figure 16. To view Links palette

WORKING WITH OBJECTS CONT.

PLACING IMAGES

Place is the function used to insert an image into your document. It is comparable to Microsoft Word's "Insert Picture from File" function. When you Place something into your document, it is "linked" to the document from its current location (as previously mentioned). Therefore, it is recommended that you store all of your content for your document in the same location.

To Place an image into your document do the following:

1. Make sure the Pointer Tool is selected. (If the Text Tool is selected when placing an image, the image will insert within a blank Element - not as an independent unit. Images within Elements are difficult to format and reposition.)
2. Go to **File > Place**.
3. Navigate through the pull down menus to find the file that you want to insert. Select the file and hit **OK** (Fig. 17).
4. Your cursor will change into a small grey picture box that represents your "unplaced" image. Find the approximate location where you want to drop the image and click the mouse once.

Once you have Placed the object, switch to the Pointer Tool to move the object to the precise location where you want it. If you want to resize your image, single-click on your image, click the Free Transform Tool (E) and you can resize it using the "grippers" – little black squares - that surround the image. Click and drag a gripper inward or outward to expand or shrink you image as desired. If you would like to maintain the original proportions of the image when you resize it, hold down the Shift key as you perform the resizing action.

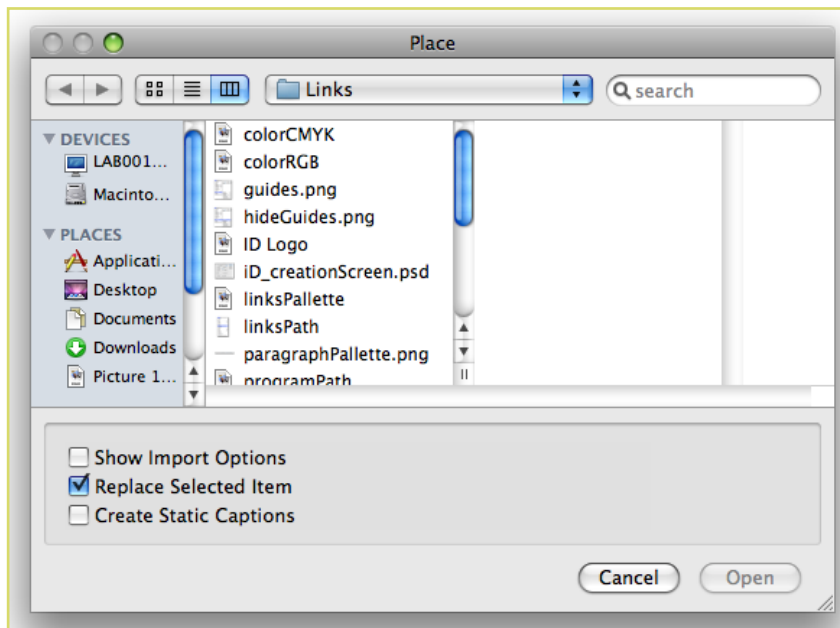


Figure 17. "Place" dialog box

WORKING WITH OBJECTS CONT.

ENABLING TEXT WRAP

If you have a large block of text and would like to insert an image in close proximity without the text or image overlapping, you can use a function called Text Wrap (which is used frequently in Microsoft Word.) Using the Pointer Tool, click on the image and go to **Window > Text Wrap**. There are several visual options that display the different kinds of Text Wraps (Fig. 18). The numerical settings at the bottom of the window denote how much “buffer space” should be maintained between the image and the text.

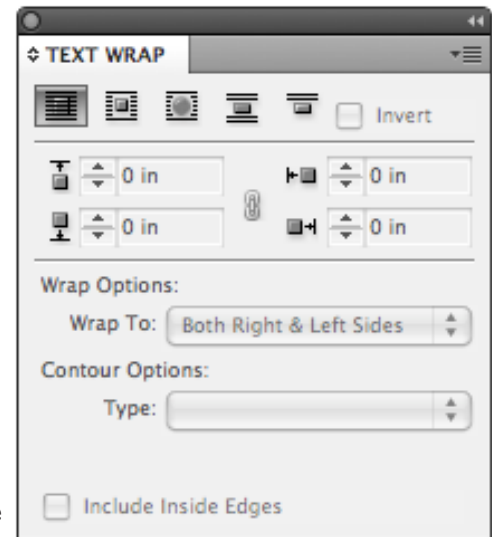


Figure 18. Text Wrap palette

GROUPING

Frequently, you will have many Images, Graphics, and Elements on the screen at once. It can be very beneficial to connect several of these together once they are positioned correctly so that you can move all of them at once and maintain the relational distance between each of them. This function is called Grouping.

To Group two or more objects, do the following:

1. Select all of the objects that you want to Group together. This can be done in two ways (both using the Pointer Tool):
 - Hold down the Shift key and click on each object individually, or,
 - Starting in an empty space on the page, click and hold the mouse and drag it outward creating a “ghost box” around all of the objects you want to select. When you release the mouse all of the items within the box should be selected. (Fig. 19)
2. Click **Object > Group** (Fig. 20).
3. If you click over the newly grouped objects with the pointer tool you will notice that they are bound together as one large object. The tip-off is that the bounding box connecting them, which was once solid, has now become dashed, and the individual object outlines have disappeared. (Fig. 21).
4. To ungroup these objects, click on the grouped objects and hit **Object > Ungroup**.

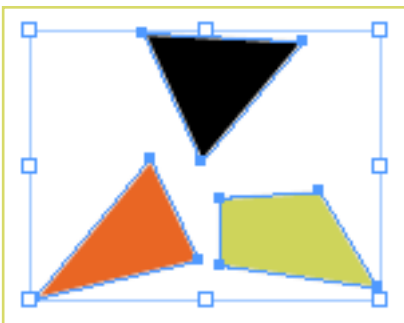


Figure 19. All selected, not grouped

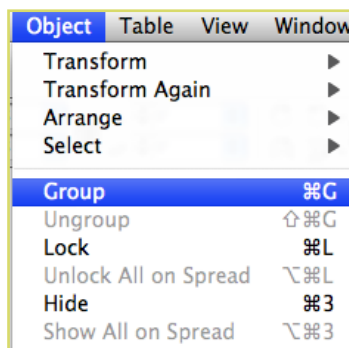


Figure 20. Object > Group



Figure 21. Grouped

WORKING WITH OBJECTS CONT.

LOCKING

Sometimes, you may have an object placed exactly where you want it and you will want to avoid moving it by accident. (For example, if you have a large image or graphic as a background for the page, you may select it and move it accidentally if you are not careful.) Therefore, InDesign has a function called Locking to help you avoid such accidents. When an object is Locked, it cannot be moved, adjusted, or altered in any way.

To Lock objects, select them using the Pointer Tool and click **Object > Lock Position** (Fig. 22). Notice now that InDesign restricts the object from being altered in any way. To unlock the object(s), click **Object > Unlock All on Spread** (Fig. 23).

NOTE: As with Grouping, you can hold down the Shift key to select multiple objects.

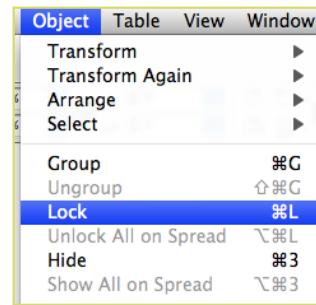


Figure 22. Object > Lock

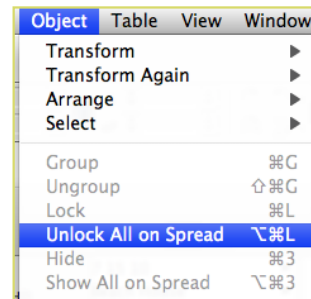


Figure 23. Object > Unlock All on Spread

SAVING

Saving your document should be a habit when working in InDesign. Saving frequently lessens the risk of losing the work you have been doing.

1. To save your InDesign document go to **File > Save As**.
2. The Save As dialogue box will appear (Fig. 24).
3. Navigate to the place you would like your document to be saved by using the drop-down menu and navigation window.
4. Enter the name of your document in the Save As text field.
5. Click the Save button in the lower right corner of the dialogue box.
6. Check to make sure that your document is saved in the place you intended.

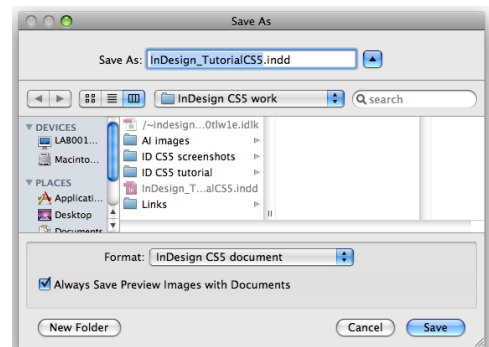


Figure 24. File > Save As

EXPORTING TO PDF

WHAT IS A PDF?

Portable Document Format (PDF) files are an excellent way to share page files with others without the common hassles of matching applications, fonts, large file sizes, and cross platform compatibility (Mac to PC). A PDF file contains all of the elements required to view and print a document that matches the original design in all respects (type style and size, images, color, layout, etc.)

PDFs can be viewed and printed without access to the original application that created it. Viewing and printing is done from Adobe Acrobat Reader, software that can be copied and freely distributed.

Another feature of PDF files is their compact nature. These files are compressed in multiple ways to render a document that is just a fraction of the size of the original document. This makes them very handy for transportation and storage. This feature enables PDF files to be efficiently attached to e-mail messages. Unlike their originating documents, PDF files are not fully editable, without specialized software. This can be an advantage when sharing files that you don't want changed in any way.

NOTE: InDesign differs from most programs in the way it creates PDFs.

CREATING A PDF

When you are ready to create the PDF file take the following actions:

1. Save your document.
2. Go to **File > Export > Adobe PDF**.
3. A dialogue box will appear asking you to save (Fig. 27); this time, you will be saving the PDF file, not the original document. Name the new file (without deleting the .pdf file extension.) and hit Save. A dialogue box will appear in which you can adjust settings from jpg quality to the particular pages you want to include in the PDF (defaults to all). Make changes accordingly and hit OK.

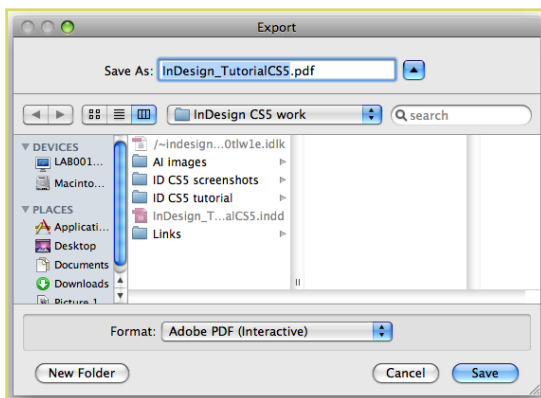


Figure 25. File > Export > Adobe PDF

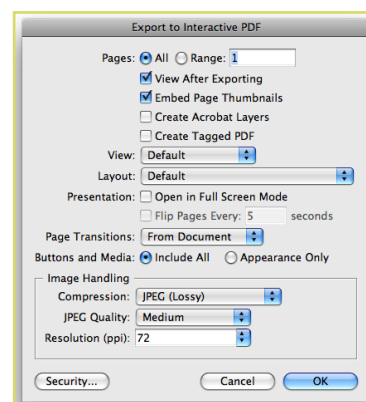


Figure 26. PDF dialogue box.