

# Preferences and the Workspace

Here are a few quick notes of some of the things I plan to go over. I would expect you know about at least a few of these things, but likely not all of them!

## Preferences

Go to the Edit menu and choose Preferences. Just a few starting points:

- **Page Numbering** affects how you interact with pages in ID. Absolute Numbering always counts 1, 2, 3, etc. With Section Numbering, it can count any way you like (1-1, 1.2, iii) and any combination you like—just define sections. This *only* applies to how you interact with ID—printed pages will work however you number them.
- Check the **Preserve Text Attributes When Pasting** option. It'll retain formatting from text pasted from Word, for example.
- In the Text preferences, check **Use Typographer's Quotes**.
- **Automatically Use Correct Optical Size** only affects Multiple Master fonts that specify an optical x-height for the characters. Which doesn't apply to us.
- Leave **Adjust Text Attributes When Scaling** turned on. Really, it's just a feature to help people who use older version of ID.
- PageMaker applies leading on a character by character basis. Leave **Apply Leading to Entire Paragraphs** turned off to mimic this. Turn it on to make leading affect the entire paragraph.
- **Create Links When Placing Text and Spreadsheet Files** will do just what it says. By default, links are *not* created.
- In the Composition preferences, turn on the **Highlight** options to see problematic areas of a document and more information. This is non-printing information.
- Personally, I think **Justify Text Next to an Object** is a dumb feature. It makes for poor design: Place an image in the *middle* of a column of text that is *not* justified (left, center, or right-aligned only). Turn on “wrap around object shape” text wrap. With this option turned *on*, the text gets *justified* around the object.
- **Skip by Leading** lets ID do a better job of aligning text to the baseline grid under certain circumstances.
- Leave **Text Wrap Only Affects Text Underneath** turned off to mimic PageMaker.
- Keyboard increments. These options affect these keyboard shortcuts:
  - Cursor Key: **arrow keys**
  - Text Size: **ctrl-shift->** and **ctrl-shift-<**
  - Leading Size: **alt-up arrow** and **alt-down arrow**
  - Baseline Shift: **alt-shift-up arrow** and **alt-shift-down arrow**
  - Kerning: **alt-left arrow** and **alt-right arrow**
- Set up a **Baseline Grid** to help keep text aligned. Always using a light-colored one sounds like a good idea to me. This is a non-printing option.
- Set up a **Document Grid** to help with any sort of alignment. Also a non-printing option.
- **Snap To Zone** is the distance—in screen pixels—that objects will get snapped to.
- Change the **Minimum Vertical Offset** to affect the pasteboard height.
- **Merge User Dictionary into Document** will help everybody use the same “language.”
- Turn off **Recompose All Stories When Modified**. Otherwise, different user dictionaries will cause different breaks for different people. Plus, it's a slow process.

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- In the File Handling preferences, setting the **Document Recovery Data** folder to your second (“swap”) hard drive *could* show a substantial performance benefit, depending on file size.

## Setting Defaults

There are two kinds of default settings: application-level and document-level. Application-level defaults set defaults for all new documents. Document-level defaults affect only that document.

- Set application-level defaults for settings/elements you often use in documents. A default font, line-weight etc.

## Workspace

The Workspace is the whole InDesign area—pasteboard, palettes, documents, etc.



- Grab the palette title bar to drag it out of or into a group. Dragged palettes can be configured in quite a few ways—try it.
- Got palettes (and palette options) organized just how you like them? Go to the Window menu, choose Workspace and **Save Workspace**. After working for a while—and likely moving some palettes—just choose your Workspace to go back to it as a starting point. Create different Workspaces for different purposes.
- Press **Tab** to hide all palettes, showing your whole pasteboard area. (This doesn’t work if you’re using the Text tool.)
- Change or view keyboard shortcuts by opening **Keyboard Shortcuts...** in the Edit menu. Print them all for reference by clicking the **Show Set** button, then print.

## Navigation

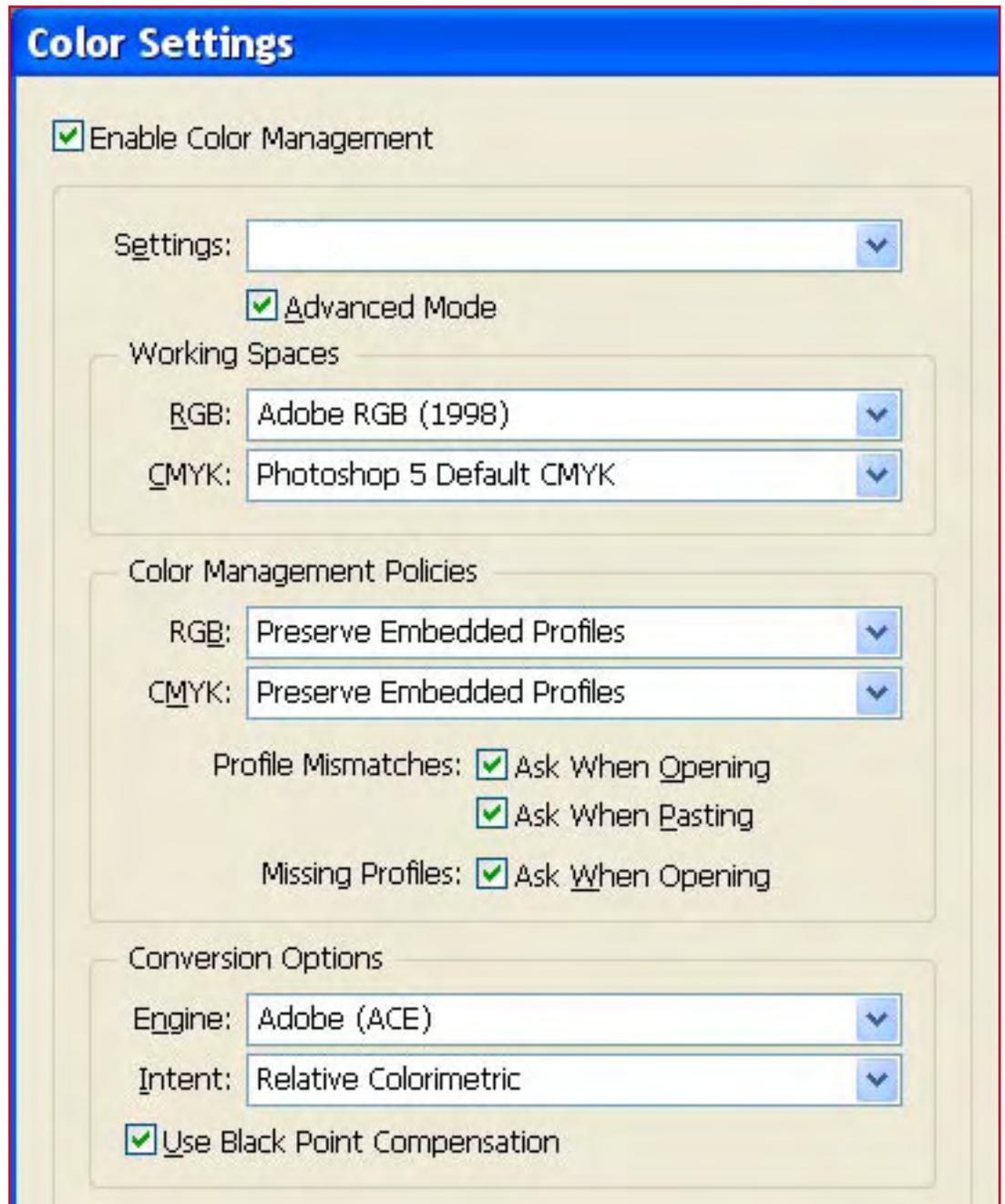
Moving around InDesign can be a lot faster than PageMaker; no need to bother with slow scroll bars. Try these:

- Like in Photoshop, press the **spacebar** to get the **Hand** tool. Drag the page to go to a different area. (Of course, you can’t be using the Text tool to do this.) You can use **Alt+spacebar** to get the Hand tool with the text tool, though.
- Use the **New Window** view (found in the Window|Arrange menu). This will open another view of the current document. Leave one window set to page 1 and another to page 5. Now you can see how your layout changes affect the end of the text frame on page 5. Or, use two windows to copy several objects from one page to another without having to turn pages.
- Use the **Navigator** palette (found in the Window menu). Self-explanatory, I think.
- Zooming is just like Photoshop: I think the fastest way to zoom in might be to hold the **ctrl+spacebar** key, then click or drag a rectangle to zoom in on. To zoom out, try **ctrl+alt+spacebar** and click. You *can* use the text tool to do this.
- Another good zooming technique: **ctrl++** (control key and + key) and **ctrl+-** (control key and - key).
- Double-click the **Zoom** tool to return to 100% view.
- Try **ctrl+alt+i** to see typographer’s marks within the layout view. This also works in the Story Editor view.
- To quickly turn pages, try hitting **ctrl+j** (to enter the Go To Page field) and typing a page number.

# Color Settings

A good starting point for Color Settings is as below. These settings can be project-specific.

- Photoshop 5 Default CMYK is a relatively safe starting point, and probably a good working space for anything you'd send to the "Commercial" Epson printer setup.
- US Web Coated (SWOP) v2 is probably a good choice for QST.
- These settings don't affect any 1-color project, including books and the other magazines.
- Use the **Save...** option to save presets.



The screenshot shows the Photoshop Color Settings dialog box with a blue title bar. The settings are as follows:

- Enable Color Management
- Settings: [Empty dropdown]
- Advanced Mode
- Working Spaces
  - RGB: Adobe RGB (1998)
  - CMYK: Photoshop 5 Default CMYK
- Color Management Policies
  - RGB: Preserve Embedded Profiles
  - CMYK: Preserve Embedded Profiles
  - Profile Mismatches:  Ask When Opening,  Ask When Pasting
  - Missing Profiles:  Ask When Opening
- Conversion Options
  - Engine: Adobe (ACE)
  - Intent: Relative Colorimetric
  - Use Black Point Compensation

# Palettes and Tools

Just about everything is accessible from within a palette. Click the little triangle for more options—most palettes have them.



- In any palette where you can create something “new”—such as a character style or layer—**alt+click** to go right to the definition dialog box.

- Use the **Align** palette to easily align and distribute objects. Just select more than one object and click the appropriate button.

- The little exclamation point you might see in the **Color** palette signifies and out-of-gamut color—one that is currently unprintable. Click the exclamation point to “correct” it.



- The **Gradient** palette will *not* allow noise to be added, so large grades *will* show banding. It should be fine for small ones, though. Gradients on a stroke!

- The **Info** palette shows you all kinds of info: position, size, text info, and graphics info (including color space and effective resolution). Click the little triangle next to an icon to change measurement units and swap between color space and swatch.

- Using **Layers** for master pages might be a good idea (to always keep some elements on top), but I don’t see much of a use for them otherwise.

- The **Links** palette is where links to graphics are managed. Note that if **Create Links When Placing Text and Spreadsheet Files** is turned on (in Preferences), links to text files appear here. If turned off, they don’t exist at all.

- Use the **Flattener Preview** palette to preview transparent areas and diagnose problematic printing. This palette is probably better saved for a “Transparency Class.”

- Use the **Pages** palette to add, delete or reorganize pages and spreads. Also, create and apply master pages here. Perhaps one of the

most important palettes. More “pages” capabilities will be covered in a later class.

- Double-click the page icon to view that page; double-click the page numbers (beneath the page icons) to view the spread.
- **Alt+double-click** to view the page/spread at Fit in Window magnification.
- Note that the selected page and the targeted (viewing) page are two different things. Important to know for when adding/deleting pages and making multiple selections (**shift+click** or **ctrl+click**).
- Drag a Master Page to a Document Page to apply the settings.
- Copy a Master Page or Document Page by **alt+dragging** it.
- **Keep Spread Together** is a good option for helping to make gatefold pages, but I’m not sure it’s useful other wise.
- Drag Document Pages to reorganize them.
- There are only two reasons to turn off **Allow Pages to Shuffle**: to start on a left-hand page or to bleed off the binding edge of a spread.
- Sections are cool, though I can’t think of an immediately obvious use for them.
- Use the **Override All Master Page Items** option to edit master page items on the current page.
- The **Pathfinder** palette is probably best saved for a “Paths and Drawing Class.” Use it to control path interaction.
- The **Swatches** palette is most like PageMaker’s color palette. Note that it can also house gradients. Note how you select fill or stroke.
- The **Tags** palette is something we might look at later. It’s for tagging XML and PDFs with metadata, but I don’t know that we can benefit from using it now.
- The **Transform, Paragraph** and **Character** palettes are all recreated in the **Control** palette, at the top of your screen.
- You either already know the **Transparency** palette tools or are mystified by them. To be covered later.

- The **Glyphs** palette is like Character Map on steroids. In particular, check out the Alternates for Selection option in the drop-down box, which will suggest replacements for selected characters. Also note the zoom buttons.
- **Paragraph Styles** are like PageMaker's Styles.
- **Character Styles** can be applied to just characters, as the name says. Useful for minor formatting issues. Both Styles palettes will be covered more in-depth in a later class.
- Working with tables and the **Tables** palette might be something to cover later, though it's not difficult to figure out.

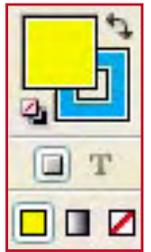
## Tools

I'd expect you're at least vaguely familiar with most of these, so this is quite abbreviated. (Well, except for the bottom piece of the palette.)

- Use the **Selection** tool to select objects. Use the **Direct Selection** tool to select objects *within* objects. The **Position** tool is part of the PageMaker Plug-In Pack—sort of a combination of the two.
  - **Ctrl+click** with the Selection tool to select objects not on top.
- The **Pen** (and all its subtools), **Pencil**, **Smooth**, **Erase**, **Line**, frame tools, shape tools, and **Scissors** are all just ways to draw and manipulate paths.

- The **Rotate**, **Scale** and **Shear** (and **Free Transform**, a combination tool) tools let you manipulate any object, not just shapes.
- The **Eyedropper** is a lot more powerful than you might at first think. Use it to pick up and apply formatting attributes—colors, stroke size, color, and text formatting. The first click selects the formatting, second click applies it. Or, select the unformatted object then click the Eyedropper on the already-formatted object. **Alt-click** to reselect formatting. Double-click the Eyedropper tool for an Options dialog that controls what is and is not selected/formatted with this tool.

- To make the **Fill** or **Stroke** “selectors” active, click them. If working with text, note the **Formatting Affects** buttons, beneath—the Fill and Stroke properties can affect either the text container or the text itself. Beneath are the **Apply Color**, **Apply Gradient**, and **Apply None** buttons. (Apply None is a little misleading as it's more like a Remove Formatting button.)



- **Normal View Mode** is what you'll normally what to work with. The **Preview** modes will hide things hanging off the page; **Preview Bleed** and **Preview Slug** modes will show you their space.



# Working with Text

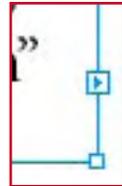
In InDesign, all text goes into a Text Frame. If you try to place text in a Graphic Frame or Unassigned Frame, that frame is converted to a Text Frame.

- Open the **Character**, **Paragraph** and **Transform** palettes by clicking this icon in the Control palette.



- Draw a Text Frame to place text into, place text into an existing Text Frame, or place text anywhere and a frame gets created for it. Use any frame tool (**Rectangle**, **Ellipse** or **Polygon**) to make a frame.

- Turn on **Show Text Threads** (in the View menu) and click a text frame to see what other frames it's linked to. Useful if you want to know where placed text will flow to. Link frames together by clicking the "out" port on the frame, then click the destination's "in" port when it becomes a chain icon. Unlink Text Frames in the same way.



- One text frame can be used to hold multiple columns. Right-click a text frame and look at **Text Frame Options** to see how it works.
- When making a boxed sidebar, apply a stroke to the frame. Then, in **Text Frame Options**, specify some amount of Inset Spacing to add some space between the text and stroke.
- While in **Text Frame Options**, set First Baseline Offset mode to **Leading**, with a Min value of 0. Fixed is also a good option to use. The other three (Ascent, Cap Height, and x-Height) are variable methods, yielding different results depending upon font face and size of the first line in that text frame.
- Use **Ignore Text Wrap** to make the text in that frame ignore text wrap settings.
- Maybe the best way to get columns of text to line up is to just do a little math: if body text leading is 14 points, header leading should be 14 pts or a multiple (28 or 42 pts, for example, which could also mean 7 pts above and 7pts

below). But InDesign has some tools to help make alignment work: go to the View menu and choose **Show Baseline Grid** for a grid to visually align with. Go to Edit|Preferences|Grids to make the grid suit the text's leading (specifically, change **Increment Every**).

- Going a step further, you can select a misaligned paragraph, open the Paragraph palette and click the **Align to Baseline Grid** button to align the text—particularly useful for subheads at the top of a column. Can also be applied to styles.
- When placing text, there are three ways it might flow:
  - Manual. Basically, text flows into one frame only, honoring columns and existing Text Frames, if placed into them.
  - Semi-Automatic. Press **Alt** while placing text. The cursor will be re-loaded after filling the frame for you place the rest of the text in another frame.
  - Automatic. Press **Alt+Shift** while placing text. InDesign fills all the pages in the document with text (and adds frames as necessary), but will *not* add any more pages.
  - Super-Automatic. Press **Shift** while placing text. InDesign places all of the text, adding frames and pages if necessary.
- Special character shortcuts you'll probably want to use (though don't forget that you can re/define any keyboard shortcut). Also look in the Type|Insert Special Character menu or the context-sensitive (right-click) Insert Special Character menu.
  - Forced Line Break—**Shift+Enter**
  - Frame Break—**Shift+NumPad Enter**
  - Page Break—**Ctrl+NumPad Enter**
  - Bullet Character—**Alt+8**
  - Discretionary Hyphen—**Shift+Ctrl+-**
  - Ellipsis—**Alt+;**
  - Em Dash—**Shift+Alt+-**
  - En Dash—**Alt+-**
  - Nonbreaking Hyphen—**Ctrl+Alt+-**
  - Em Space—**Shift+Ctrl+M**
  - En Space—**Shift+Ctrl+N**
  - Hair Space—**Shift+Ctrl+Alt+I**

- Nonbreaking Space—**Ctrl+Alt+X**
- Thin Space—**Shift+Ctrl+Alt+M**
- Automatic hyphenation on/off—**Shift+Ctrl+Alt+H**
- Similar to automatic hyphenation, use the **No Break** option in the Character palette fly-out to keep text from breaking. No Break can be used with strings of words.
- Use the **Keep Options** (in the Paragraph palette fly-out menu) to eliminate widows and orphans, and to keep subheads from disconnecting from their text.
- Master page items that appear on the current page can be edited by turning on **Override All Master Page Items** in the Pages palette.
- You don't need to enter Story Editor to use the **Find**, **Change** or **Spelling** tools.
- InDesign will *not* create fake bold or italic font styles. That is, if a style doesn't exist for the font, you can't select it.
  - Create a fake italic font by Skewing text to about 10°.
- Automatically kern text with the **Metrics** or **Optical** methods. Optical typically works a little better. It's not perfect, but it's definitely better than unkered text.
- Instead of using Copy and Paste, try **alt+dragging** a text frame. Actually, this works with any object.
- Select single or multiple Text Frames (with the Selection tool, not the Text tool) and apply type changes to all frames.
- **Optical Margin Alignment** is a cool feature that's supposed to make text easier to read by adjusting the left- and right-column overhang. It can't be applied through styles, only by going to Type|Story; it's applied to the entire document. Set the size to the most-used text—likely body text.
- This probably belongs in the Palettes and Tools section, but I missed the feature: open the **Glyphs** palette. Use the fly-out menu to add a New Glyph Set, then add your most-used characters to it. Use Edit Glyph Set to determine whether the font and glyph are remembered, or just the glyph. Use View Glyph Set to always have those at your fingertips.
- Use the Adobe Paragraph Composer (in the Character palette fly-out menu) when setting up styles. It's a little weird to get used to because it flows and breaks lines of text only *after* a paragraph has been typed—in other words, the entire paragraph will often move as you're typing—but the final result will look much nicer than when using the Adobe Single-line Composer.
- OpenType Features (in the Character palette fly-out menu): **Titling**, **Contextual**, and **Swash Alternates** might be appropriate for display text (all of which add some special flourishes, if the font has them). **Ordinals** are the “st,” “nd,” and “rd” in 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup>. **Fractions** will make typed fractions into “real” fractions—sort of like the PageMaker fraction script. **Discretionary Ligatures** probably shouldn't be used, though normal ligatures should be.
- Styles: Paragraph, Character and Nested.
  - **Character Styles** are styles that can be applied to only a few characters. Limited styling is available.
  - **Paragraph Styles** are just like styles in PageMaker, and get applied to whole paragraphs.
  - **Nested Styles** combine the two. Within a paragraph style, use a nested style to apply a character style (or a combination of character styles) to text within a paragraph. Use a nested style to differently-style a drop cap, for example, or to style *all* elements of a bibliography reference. If an end to a nested style can't be created, try the **End Nested Style Here** Special Character.

# Examples

## Miscellaneous

- Use the **Align** palette to align and evenly distribute multiple objects.
- When Placing documents/photos/drawings, click the Show Import Options box to control the import: select an alpha channel, crop options, text options, etc.
- Delete all guides by first selecting them (**Alt+Ctrl+G**) then pressing **Delete**. Alternatively, go to **Layout|Create Guides** and click Remove Existing Ruler Guides, being sure not to create any new ones.
- Library palette. Use File|New... and File|Open... to work with Libraries. Use a library to store frequently-used items, or to move whole page contents.
- The back of the Jamboree QSL card is a good example of using vertical justification (in Text Frame Options).

## Boxing Photos and Drawings

First, set a default stroke weight to save a few clicks later on. A default stroke weight can only be created at the application-level (with all documents closed), not at document-level (with a document open).

- Place the drawing/photo, be sure the stroke selector is selected, and click a swatch to apply the stroke color.
- Drag the frame to the desired width and height (column size, likely). Right-click the object, choose Fitting and **Center Content** (or press **Shift+Ctrl+E**).

## Creating a Sidebar

- Place text or cut and paste text into it's own frame.
- Right-click the frame and choose **Text Frame Options** (or press **Ctrl+B**). Use

the Inset Spacing option to set how far from the edge the text should be.

- Set Fill and/or Stroke color, tint, and weight.
- If the frame is too big for the content, try right-clicking on the frame and choosing Fitting|**Fit Frame to Content** (or press **Alt+Ctrl+C**). Note that the last line's Inset Spacing is measured by the baseline of the font, so any descenders appear to sit a little lower than maybe it should. Two easy ways around this: make the bottom Inset Spacing a little bigger or make the frame a little taller after using Fit Frame to Content.

## Creating a Template

Using frames and threading, page layout can be radically simplified.

- First, import a document. Create frames to house each element of the document (such as title and body) without cutting apart the document—basically, lay the page out. This is best done with master pages. Create a master page for the front page and a master page for the rest of the document, for example.
- Edit Styles. Specifically, be sure to add a Start Paragraph In Next Frame **Keep Option**.
- Use the text tool to delete all of the content. Do *not* delete the frames or their threading. Turning on View|**Show Frame Edges** can be useful here.
- Place a new document into the first frame of the first page. Between the styles and the frames, the page should be mostly layed-out and more-or-less correct.