







## Classroom in a Book®

The official training workbook from Adobe Kelly Kordes Anton & Tina DeJarld

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# 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.
- Add a QR code.
- 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 adobepress.com/InDesignCIB2022. For more information, see "Accessing the lesson files and Web Edition" in the Getting Started section at the beginning of this book.



Bistro & Bar

Relax in our elegant dining room or charming patio and enjoy the creations of our bartender, chef and gardener! Our irresistible appetizers, seasonal entrées and homemade desserts feature fruits, flowers and herbs grown right here in our stunning Urban Oasis Gardens.

#### **Starters & Small Plates**

Sip a rosé martini, try zucchini blossom fritters or braised dandelion greens for appetizers, and share small plates such as orange ginger seared scallops or chive flower flatbread.

#### **Entrées & Desserts**

Indulge in our chef's daily creations, such as lavender honey grilled chicken or fresh basil pesto and be sure to leave room for scrumptious violet macarons or candied pansies.

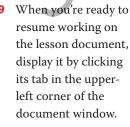


The building blocks of an Adobe InDesign layout are objects, text, and graphics. Layout aids such as guides help with size and placement, and styles let you format page elements automatically.

## **Getting started**

The document for this lesson is a standard-size postcard designed to be printed and mailed. In addition, the postcard can be exported as a JPEG to use in email marketing. As you will see in this lesson, the building blocks of an InDesign document are essentially the same, regardless of the output media. In this lesson, you will add the text, images, and formatting necessary to finish the postcard.

- 1 To ensure that the preferences and default settings of your Adobe 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 Adobe InDesign.
- **3** When the InDesign Home screen displays, click the Open button at the left. (If the Home screen does not display, choose File > Open from the InDesign menu bar.)
- 4 Open the 02 Start.indd file in the Lesson02 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.
- Choose File > Save As, rename the file **02 Postcard.indd**, and save it in the Lesson02 folder.
- 7 This lesson uses the default Essentials workspace. If necessary, choose Window > Workspace > [Essentials], and then choose Window > Workspace > Reset Essentials.
- 8 If you want to see what the finished document looks like, open the 02\_End.indd file in the same folder. You can leave this document open to act as a guide as you work.
- resume working on the lesson document, display it by clicking its tab in the upperleft corner of the document window.





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.

**Note:** To better view the interface

onscreen or in print,

the screen captures in this book reflect the

Medium Light interface

rather than the default

setting of Dark. In addition, some screen

captures illustrate **User Interface Scaling** 

for a closer look at

interface elements. You

settings in Preferences.

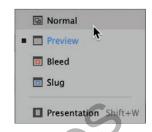
can modify interface

## Viewing guides

Revising or completing an existing document, as you will do in this lesson, is typical work for entry-level InDesign users. Currently, the postcard document is displayed in Preview mode, which displays artwork in a standard window, hiding nonprinting elements such as guides, grids, frame edges, and hidden characters. To work on this document, you will view guides and hidden characters (such as spaces and tabs).

1 Press and hold down the Screen Mode button at the bottom of the Tools panel, and choose Normal ( ) from the menu.

Any layout aids previously enabled now display. For example, light blue nonprinting lines now indicate existing text frames and objects because frame edges were already displayed (View > Extras > Show Frame Edges). You will now enable other layout aids.



2 Choose View > Grids & Guides > Show Guides.

When guides are displayed, it's easy to position objects with precision, including automatically snapping them into place. The guides do not print and do not limit the print or export area.

**3** Choose Type > Show Hidden Characters.

Displaying hidden (nonprinting) characters, such as tabs, spaces, and paragraph returns, helps you precisely select and style text. In general, it's a good idea to show hidden characters whenever you are editing or formatting text.

**Tip:** The lesson document starts out in Preview Screen Mode and then you switch to Normal Screen Mode. The other modes are Bleed, for reviewing the predefined bleed area for objects that extend beyond the page boundaries; Slug, for displaying the area outside the bleed area that can contain information such as printer instructions; and Presentation, which fills the screen and works well for presenting design ideas to clients.

► **Tip:** As you become comfortable working with InDesign, you will discover which Screen Modes and layout aids work best for you.



4 As you work on this document, use the skills you learned in Lesson 1 to move panels, scroll, and zoom as necessary.

## Adding text

With InDesign, most text is contained by a text frame. (Text can be contained in table cells and flow along paths as well.) You can type text directly into a text frame or import text files from word-processing programs. When importing text files, you can add the text to existing frames or create new frames to contain the text. If text doesn't fit within a single frame, you can link multiple text frames using a process called "threading." You will learn more about flowing text, including dividing text frames into columns, in Lesson 6, "Flowing Text."

#### Typing and styling text

You're ready to start working on the incomplete postcard. To get started, you'll edit and style the text under the headline.

- 1 Select the Type tool (T) and click immediately after the word "Café."
- 2 Press Backspace (Windows) or Delete (macOS) four times to delete the word "Café."

Relax in our elegant dining room or charming patio and enjoy the creations of our bartender, chef and gardener!

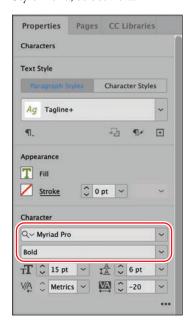
Type **Bistro** in the text frame so that the restaurant's descriptor is changed from "Café & Bar" to "Bistro & Bar."

Relax in our elegant dining room or charming patio and iou the creations of our hartender chef and gardener

**► Tip:** Use the Type tool to edit and format text, and create new text frames.

- 4 With the insertion point still in the text, triple-click to select "Bistro & Bar."
- 5 Locate the Character controls of the Properties panel at the right. From the Font Style menu, select Bold.

Tip: Using the Type tool, you can doubleclick to select a word, triple-click to select a line, and click four times to select a paragraph.





- **6** Click outside the text frame to deselect the text.
- 7 Choose File > Save to save your work.

## Options for styling and placing text

In the Essentials workspace, the Properties panel displays at the right to provide quick access to the most common text formatting options. InDesign provides other options for formatting characters and paragraphs and for positioning text within a frame. Common text formatting options include:

- Character formats: Style, Size, Leading, All Caps
- Paragraph formats: Alignments such as Center, Indents, Space Before/After
- Text Frame Options: Columns, Inset Spacing, Vertical Justification

The Control panel, Paragraph panel (Type > Paragraph), and Character panel (Type > Character) provide all the controls you need to style text. To control the positioning of the text within its frame, such as dividing text into columns, choose Object > Text Frame Options; many of these options are in the Control panel as well.

#### Importing and flowing text

In most publishing workflows, writers and editors use word processors. When the text is almost final, they send the files to graphic designers. To complete the postcard, you will import a Microsoft Word file into a text frame at the bottom of the page using the Place command. You will then thread (link) the first text frame to the second frame. All the text in a series of threaded text frames is called a "story."

- 1 Using the Selection tool ( ), click a blank area of the pasteboard to make sure no objects are selected.
- 2 Choose File > Place. At the bottom of the Place dialog box, make sure that Show Import Options is not selected.
- 3 Navigate to the Lesson02 folder, in the Lessons folder, and double-click the Bistro.docx file.
  - The pointer changes to a loaded text icon (). You'll add this text to the text frame in the lower-left quadrant of the postcard. (The text frames are outlined by light blue nonprinting lines.)
- Position the loaded text icon in the text frame, and then click.



Starters & Small Plates Sip a rosé martini, try zucchini blossom fritters or braised dandelion greens for appetizers, and share small plates such as

An out port on the text frame; the red plus sign indicates overset text.

- **Note:** To see where to place the body copy text, consult the finished lesson document, 02 End.indd.
- **Tip:** When the loaded text icon is displayed, you have several choices: You can drag to create a new text frame, click inside an existing frame, or click to create a new text frame within the page's column guides.

The text in the Word file fills the frame, but it may not all fit. A red plus sign (+) in the out port of the frame (in the frame's lower-right corner) indicates overset text. You will thread the two bottom text frames so that the text flows through them.

- **5** Using the Selection tool, select the text frame that now contains the text.
- 6 Click the out port (+) of the selected frame to display the loaded text icon. Click in the text frame immediately to the right.

Starters & Small Plates Sip a rosé martini, try zucchini blossom fritters or braised dandelion greens for appetizers, and share small plates such as orange

Tip: You can create columns by threading individual text frames or by dividing text frames into multiple columns using the General tab of the Text Frame Options dialog box (Object menu). Some designers prefer separate text frames for more layout flexibility.

At this point, text likely remains overset. You will resolve this problem by formatting the text with styles later in this lesson.

Starters & Small Plates orange ginger seared scallops or chive flower flatbread. Sip a rosé martini, try zucchini blossom fritters or braised Entrées & Desserts dandelion greens for appetizers, and share Indulge in our chef's small plates such as daily creations, such as

Note: Due to variations in font versions, you may see slightly different text in your frames.

7 Choose File > Save.

## Working with styles

InDesign provides paragraph styles, character styles, and object styles for quickly and consistently formatting text and objects. Another significant reason to use styles is that you can make global changes—such as changing the body text font or adjusting drop shadows—by simply editing the style. This can save you hours in making revisions to long documents such as books.

**Tip:** A paragraph style can include nested styles that format the beginning of a paragraph and lines within a paragraph. This automates common paragraph formatting, such as starting a paragraph with a drop cap followed by all capital letters on the first line.

Styles work as follows:

- A paragraph style includes all text formatting attributes—such as font, size, and alignment—and applies to all the text in a paragraph. You can select a paragraph for formatting by clicking in it, highlighting any part it, or highlighting all of it.
- A character style includes only character attributes—such as font style (bold or italic) and color—and applies only to selected text within a paragraph. Character styles are generally applied to call attention to specific text within a paragraph.
- An object style lets you apply formatting—such as fill and stroke color, stroke styles and corner effects, transparency, drop shadows, feathering, text frame options, and text wrap—to selected objects.

The object style for this text frame specifies the inset (that indents the text from the edges of the frame), the stroke around the edges of the frame, and the drop shadow behind it.

Starters & Small Plates Sip a rosé martini, try zucchini blossom fritters or braised dandelion greens for appetizers, and share small plates such as orange ginger seared scallops or chive flower flatbread.

Paragraph styles specify formats such as alignment and basic character formats such as font and line spacing.

Character styles specify variations from the character formats in the paragraph style.

You will now format the text with paragraph and character styles.

#### Applying paragraph styles

Because the postcard is part of a series, all the paragraph styles you need are already created. You will first apply the Body Copy style to all the text in the two threaded text frames, and then you will apply the Subhead style to the headings.

- 1 Using the Type tool (T), click in one of the text frames containing the newly imported text.
- **2** Choose Edit > Select All to select all the text in the story.
- Click the Paragraph Styles button at the top of the Properties panel. Click the Paragraph Styles menu and select the Body Copy style to format the entire story.



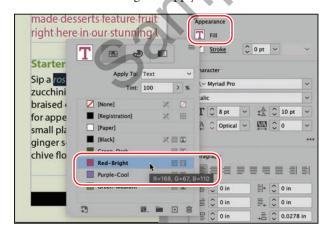
Tip: In many publishing environments, including marketing and advertising, the text in a publication is referred to as "copy," which is why the writers and editors are called "copywriters" and "copyeditors."

- 4 Using the Type tool, click in the first line of text in the story: "Starters & Small Plates."
  - As you can see from the hidden character (the paragraph return) at the end of the line, this line is actually its own paragraph. Therefore, it can be formatted with a paragraph style.
- Select the Subhead style from the Paragraph Styles menu in the Properties panel.
- Apply the Subhead paragraph style to the "Entrées & Desserts" subhead as well.
- **7** Choose Edit > Deselect All, and then choose File > Save.

#### Formatting text for the character style

Highlighting a few key words in a paragraph can draw readers into the text. For the postcard copy, you will format a few words to make them "pop" and then create a character style based on those words. You can then quickly apply the character style to other selected words.

- 1 Using the Zoom tool (Q), zoom in on the first text frame in the lowerleft quadrant of the postcard. This frame contains the subhead "Starters & Small Plates."
- 2 Using the Type tool (T), select the words "rosé martini" in the first paragraph of body copy along with the comma after it.
- 3 In the Character controls of the Properties panel at the right, select Italic from the Type Style menu.
- 4 Click the Fill box (T) to display the document's color swatches. Click the red swatch named Red-Bright to apply the color to the text.



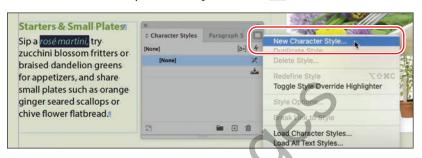
- 5 Click the pasteboard to deselect the text and view your changes.
- 6 Choose File > Save.

Note: If a plus sign (+) displays next to the applied style (Body Copy or Subhead), it indicates that the text formatting does not precisely match the style's formatting. To resolve this, click Clear Overrides (¶≠) at the bottom of the Paragraph Styles panel. You will learn more about styles in Lesson 9, "Working with Styles."

#### Creating and applying a character style

Now that you have formatted the text, you are ready to create a character style based on that formatting.

- 1 Using the Type tool (T), select the words "rosé martini" and the trailing comma again.
- 2 Choose Type > Character Styles to display the Character Styles panel.
- 3 Select New Character Style from the panel menu (■).



Note: If the New Character Style dialog box does not open immediately, doubleclick Character Style 1 in the Character Styles panel.

A new character style, named Character Style 1, is created in the New Character Style dialog box. This new style includes the characteristics of the selected text, as indicated in the Style Settings area of the dialog box.

- 4 In the Style Name field, type **Red Italic**.
- 5 At the bottom of the New Character Style dialog box, select Apply Style To Selection.



- 6 Click OK.
- 7 Using the Type tool, select the words "zucchini blossom fritters or braised dandelion greens" in the first text frame.

- **8** Click Red Italic in the Character Styles panel. Because you applied a character style instead of a paragraph style, the formatting affected only the selected text, not the entire paragraph.
- **9** Using the Type tool, select the words "orange ginger seared scallops or chive flower flatbread" and the period after "flatbread."
- **10** Click Red Italic in the Character Styles panel.
- 11 Repeat the process to apply the Red Italic character style to the menu items in the text frame at the right: "lavender honey grilled chicken or fresh basil pesto" and "violet macarons or candied pansies."



**Tip:** Typesetters often apply the same style to any punctuation following text formatted with a different style. (For example, if a word is italicized, you would italicize a comma after it.) This may vary based on design preferences or a publisher's style guide. The key is to be consistent.

**12** Click the Character Styles panel group's close box (the x in the upper-left corner), and then choose File > Save.

## Working with graphics

To add one of the final design elements to the postcard, you'll import, resize, and position a graphic. Graphics used in InDesign documents are placed inside frames. In InDesign, you can use the Selection tool ( ) to resize a graphics frame and to position the graphic within the frame. You will learn more about working with graphics in Lesson 11, "Importing and Modifying Graphics."

- 1 Choose View > Fit Page In Window. You will position the graphic in the upper-right quadrant of the postcard.
- 2 Make sure that no objects are selected by choosing Edit > Deselect All.
- 3 Click the Import File button, the last option on the Properties panel at the right. In the Place dialog box, make sure that Show Import Options is not selected.

**Tip:** You can place a graphic into an existing frame or create a new frame as you place the graphic. You can also drag graphic files from your computer's desktop onto an InDesign page or pasteboard.

- 4 Navigate to the Lesson02 folder in the Lessons folder, and double-click the DiningRoom.jpg file.
  - The loaded graphics icon ( displays a preview of the graphic. If you click the page, InDesign places the graphic at full size, inside an identically sized graphics frame. In this case, however, you will scale the graphic as you add it to the page. The resulting graphics frame will have the same dimensions as the graphic. The graphic will be placed in the upper-right quadrant of the postcard.
- 5 Position the loaded graphics icon at the intersection of the light blue and pink guides as shown.



► **Tip:** When you create a frame while placing a graphic on the page, the graphic is automatically scaled to fit within the frame. Use the scaling controls in the Properties panel and Control panel to precisely adjust the graphic size. You will learn more about sizing in Lesson 11.

Note: To see where

to place the graphic,

consult the finished lesson document, 02 End.indd.

- 6 Drag down and to the right until the pointer touches the guide on the right side of the page.
  - When you release the mouse button, the graphic is added to the page and a graphics frame is created automatically.



You will now experiment with cropping a graphic by decreasing the size of the frame, and you will try moving the graphic within the frame. You will undo these changes.

7 Using the Selection tool (), select the middle handle at the bottom of the graphics frame and drag it up. You can crop the image by dragging any of its eight resizing handles.



Use the Selection tool to crop a graphic by reducing the size of its frame.

- 8 Press Ctrl+Z (Windows) or Command+Z (macOS) to undo the crop.
- 9 Still using the Selection tool, position the pointer over the graphic to display the content grabber (①) in the center of the graphic.
- 10 Click the content grabber to select the graphic, and then drag up to position the image within the frame as you please.



**Tip:** To reposition a graphic with more control, press the Shift key while dragging. This constrains the movement to horizontal, vertical, and 45-degree angles. Click and pause briefly before moving the graphic within a frame to see the cropped part of the graphic ghosted but visible outside the frame area.

- 11 Press Ctrl+Z (Windows) or Command+Z (macOS) to undo the image move. The eventual position of the graphic should be where you placed it in step 6.
- **12** Choose File > Save.

## Working with objects

The building blocks of InDesign pages are objects: text frames, graphics frames, lines, and more. In general, you move and resize objects with the Selection tool. Objects can have a fill color (background color) and a stroke color (outline or border), which you can customize by specifying the width and style. You can move objects around freely, snap them to other objects, and place them with precision according to guides or values you enter. In addition, you can resize and scale objects and specify how text wraps around them. Here, you will experiment with a few object-related features, including adding a QR code for easy web access. You will learn more about objects in Lesson 4, "Working with Objects."

#### Moving and rotating an object

A flower graphic created by converting flower characters from the Zapf Dingbats font into outlines (Type > Create Outlines) is on the pasteboard to the left of the page. You will move this graphic to the right of the restaurant name, "edible blossoms." Then, you will rotate the object and adjust its placement.

- 1 Choose View > Fit Page In Window to center the page in the document window. If necessary, scroll left to see the flower graphic on the pasteboard.
- **2** Using the Selection tool ( ), click the flower graphic.
- 3 Drag the graphic to the right of the headline, "edible blossoms." With the object still selected, you will fine-tune the placement using the Properties panel.



In the Transform controls of the Properties panel, click the More Options button ( if necessary. To specify the object's placement in relation to its reference point, type the following values in the fields:

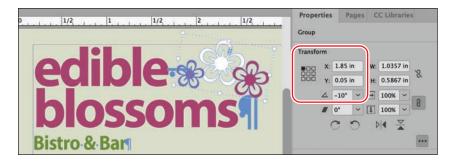
X: 1.85 in

Y: .05 in

Rotation angle ( $\angle$ ): -10

You can tab between the fields, and then press Enter (Windows) or Return (macOS) to apply the changes.

► **Tip:** When you enter values in the Properties panel or Control panel X and Y fields, the object is repositioned according to its reference point. You can view and change the reference point ( ) by clicking a box immediately to the left of the X and Y fields.



**5** Choose File > Save.

#### Changing an object's stroke and fill

When an object is selected, you can change its stroke (outline or border) weight and color. In addition, you can apply a fill (background) color.

- 1 Choose Edit > Deselect All to make sure nothing is selected.
- 2 To better focus on the objects, choose Type > Hide Hidden Characters.
- 3 Click the Direct Selection (▷) tool on the Tools panel, and then click the white flower in the graphic to select it.
- 4 In the Appearance controls of the Properties panel, click the Fill box ( ) to display the document's swatches. Click the Green-Dark swatch.



Note: The flower graphic is a group of objects. The Direct Selection tool lets you select a single object within a group. You can also select a single object in a group by double-clicking it with the Selection tool.

- **5** Press the V key on the keyboard to switch to the Selection tool ( ). Click to select the black horizontal line at the bottom of the page.
- 6 In the Appearance controls of the Properties panel, click the Stroke box (■) to display the document's swatches. Click the Green-Medium swatch.

- **7** Click the pasteboard to deselect all objects.
- 8 Choose File > Save.

#### Adding a QR Code

Consumers often expect advertising pieces to include a QR code so they can quickly visit a website for more information. The code is a graphic (generated by InDesign) that is inside a graphics frame. Here, you will add a QR code below the "see the full menu" text in the lower middle part of the postcard.

- Choose Edit > Deselect All to make sure nothing is selected.
- Choose Object > Generate QR Code.
- 3 In the Content tab of the Generate QR Code dialog box, leave the Type setting at Plain Text. Type http://www.adobe.com in the Content field.
- Click the Color tab, and then select Green-Dark in the list of swatches. This creates a QR code that matches the color theme of the postcard.





- Click OK to load the pointer with the QR code. Drag the pointer below the "see the full menu" text to place the QR code. Keep the graphics frame selected so you can fine-tune its placement.
- 6 In the Transform controls of the Properties panel, type the following values in the fields:

X: 3.6 in

H: .5 in

Y: 3.25 in W: .5 in



Note: Remember. vou can tab between the fields, and then press Enter (Windows) or Return (macOS) to apply changes made in the Properties panel.

Note: Because the

postcard in this lesson is

for a fictional restaurant,

website. When creating your own designs, you

may type or paste any URL in the Content field.

you will create a QR code to the main Adobe

- 7 To resize the OR code and center it within the frame, click Fit Content Proportionally (**III**) in the Frame Fitting controls of the Properties panel.
- Click the pasteboard to deselect all objects.
- Choose File > Save.