CHAPTER 1 STARTING WITH INDESIGN CC

INFOCUS

Adobe InDesign is a desktop publishing software application.

You can use InDesign to create all kinds of documents for print or digital publishing such as magazines, posters, brochures, newspapers and books.

Before you begin creating documents in InDesign it is important to develop an understanding of the workspace in order to create documents quickly and effectively.

In this session you will:

- ✓ gain an understanding of what *InDesign* is
- ✓ learn how to start *InDesign* in *Windows 8*
- ✓ gain an understanding of the *Welcome* window
- ✓ gain an understanding of the *InDesign* interface
- ✓ gain an understanding of the *InDesign* workspace
- ✓ learn how to open an existing document
- ✓ learn how to close a document
- ✓ learn how to exit *InDesign*.

UNDERSTANDING INDESIGN

You can use InDesign to create many different kinds of documents for print or digital publishing. Because of this, InDesign is primarily used by people who work in creative industries such as illustrators, graphic designers and editors. It is often used in conjunction with other Adobe software programs such as Illustrator and Photoshop.

InDesign Default Templates

There are several templates you can choose to work with in InDesign depending on the kind of project you are working on. You can access these templates by opening InDesign, selecting **File** > **New** and then selecting an option from the drop down menu.

The available templates are as follows:

- ***Document*** - A blank ***document*** is used most commonly as it can be used to create a variety of different kinds of publications such as brochures, posters, magazines or logos.
- ***Book*** - A ***book*** file is the best file type to use if you wish to create a book for print. A book file is comprised of a collection of documents (chapters). In order to include certain documents in an InDesign book, all of the documents must have similar styles.
- ***Library*** - If you need to find a way of organising elements that you use frequently into one easily accessible place, then you may wish to consider using a library. A ***library*** is similar to a database where you can store images, objects and text for work on particular projects.
- ***Folio -*** A ***folio*** is comprised of one or more digital publishing articles. Folios can be used to create digital magazines and books.

What can InDesign Be Used For:

InDesign is used to create, assemble and output documents for print or digital purchases such as brochures, interactive PDFs, digital magazines and EPUBS. You may wish to use InDesign to complete the following tasks:

- Create and work with typographic layouts using InDesign's typesetting tools
- Assemble artworks and photographs
- Create and work with styles
- Package and pre-flight files for commercial print
- Work with and create interactive documents that incorporate video audio and HTML content
- Create slide shows in documents
- Create and modify interactive PDF forms
- Create digital publications for tablets and other mobile devices

Using InDesign With Other Adobe Software

Because InDesign is a publishing application, it is often used with other Adobe programs that are used to create and edit graphics. For instance you can create a vector image in ***Illustrator*** and then use it in a magazine layout you have created in InDesign. While you can use InDesign to create basic vector images and the like, it is primarily used for its superior layout and formatting tools.
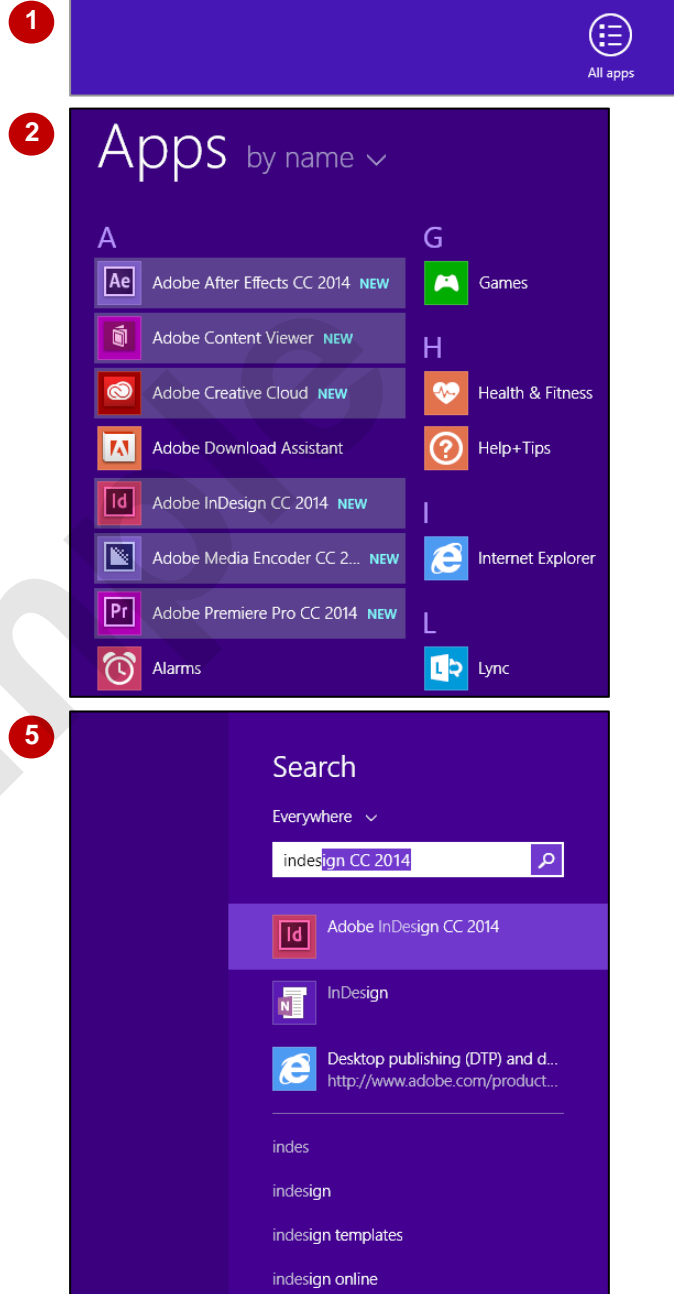
STARTING ADOBE INDESIGN IN WINDOWS 8

Before you start to work with InDesign you will need to know how to open the application. In **Windows 8** this is achieved by accessing the **Windows Start** screen, which will either be displayed by default or accessible from the desktop. You can also choose to pin InDesign to your desktop taskbar, making it easier to access in the future.

Try This Yourself:

Before you begin, ensure your computer is turned on and the Desktop is displayed…

1 Click on the **Windows** icon in the taskbar at the bottom of the screen to display the **Start** screen

2 Move the mouse pointer to display the white **down arrow** icon in the bottom left corner of the **Start** screen

3 Click on the arrow to display the **Apps** view

4 Locate the Adobe apps, then click on **Adobe InDesign CC 2014** to open InDesign

A Welcome window will display, featuring some handy tips and videos…

5 Right-click on the InDesign icon in the taskbar to display a menu of options, then select **Pin this program to taskbar**

You can now click on this icon to open InDesign from the desktop. This icon will remain in the taskbar unless you remove it

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For Your Reference…

To **start InDesign**:

1. On the **Windows Start** screen, click on the white **down arrow** icon to display the **Apps** view
2. Click on **Adobe InDesign CC 2014** to start the application

Handy to Know…

- Instead of locating InDesign in the **Apps** view, you can navigate to the **Start** screen and begin typing **InDesign** to display the **Search** pane, then click on the application name when it appears in the list of search results.

THE WELCOME EXPERIENCE

When you launch InDesign the *Welcome* window displays by default. The function of this window is to help you discover and learn about the features available in InDesign. The window is divided into four tabbed windows: *Create*, *New Features*, *Getting Started* and *Tips & Techniques*. The *Getting Started* tab is selected by default.
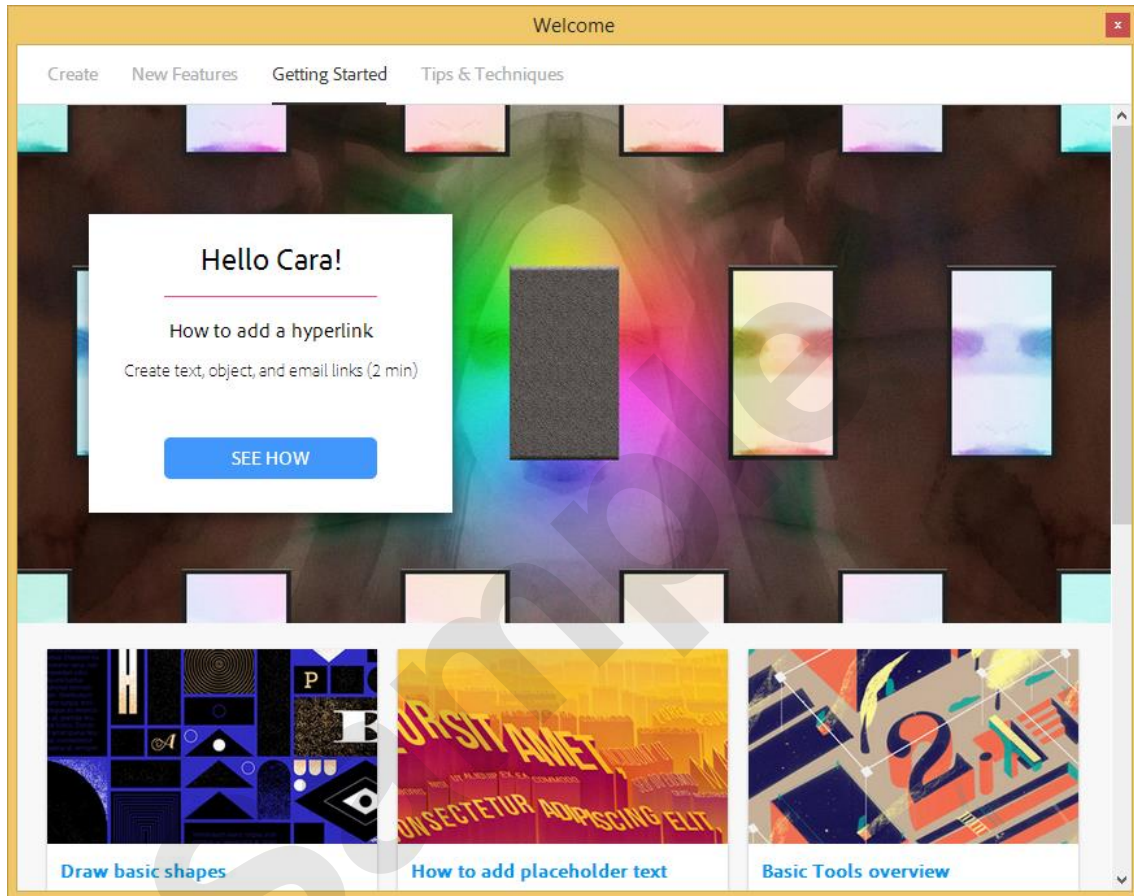
The *Welcome* window provides one central place for you to access various tools and information necessary for getting started with InDesign. The tabbed options at the top of the window enable you to access existing InDesign files and create new ones as well as look up help or information related to using the products.

Create – This tab displays recent files and allows you to open existing files or create new ones. A list of new file options such as *Photo Document*, *Web Document* or *Print Document* appear under *New*. Simply click on an option to create a new file.

New Features – Click on the *New Features* tab to display links to videos and information about features that are new to InDesign. As new features are enhanced or added to InDesign they are automatically listed here in chronological order.

Getting Started – Click on *Getting Started* for more general information on using the photography suite.

Tips & Techniques – This tab offers a selection of useful features that is designed to be personalised according to your usage of InDesign.

If you don't want the *Welcome* window to display at start up you can click on *Don't Show Welcome Screen Again* at the bottom of the *Welcome* window so it displays a tick. If you wish to redisplay the *Welcome* screen at start up you can select **Edit** > **Preferences** > **General**, then select **Do Not Show Welcome Screen On Launch** so it appears *unticked*.

Alternatively, you can access the *Welcome* screen at any time from within InDesign by selecting **Help** > **Welcome**.

THE INDESIGN WORKSPACE

The InDesign screen is commonly referred to as a *workspace* because it is here that you work on your document. It consists of many areas such as a menu bar, a *Control* panel that allows you to change settings and a panel that contains tools and settings such as palettes and document layouts. There is also a pasteboard, and of course, the page or pages of a document.
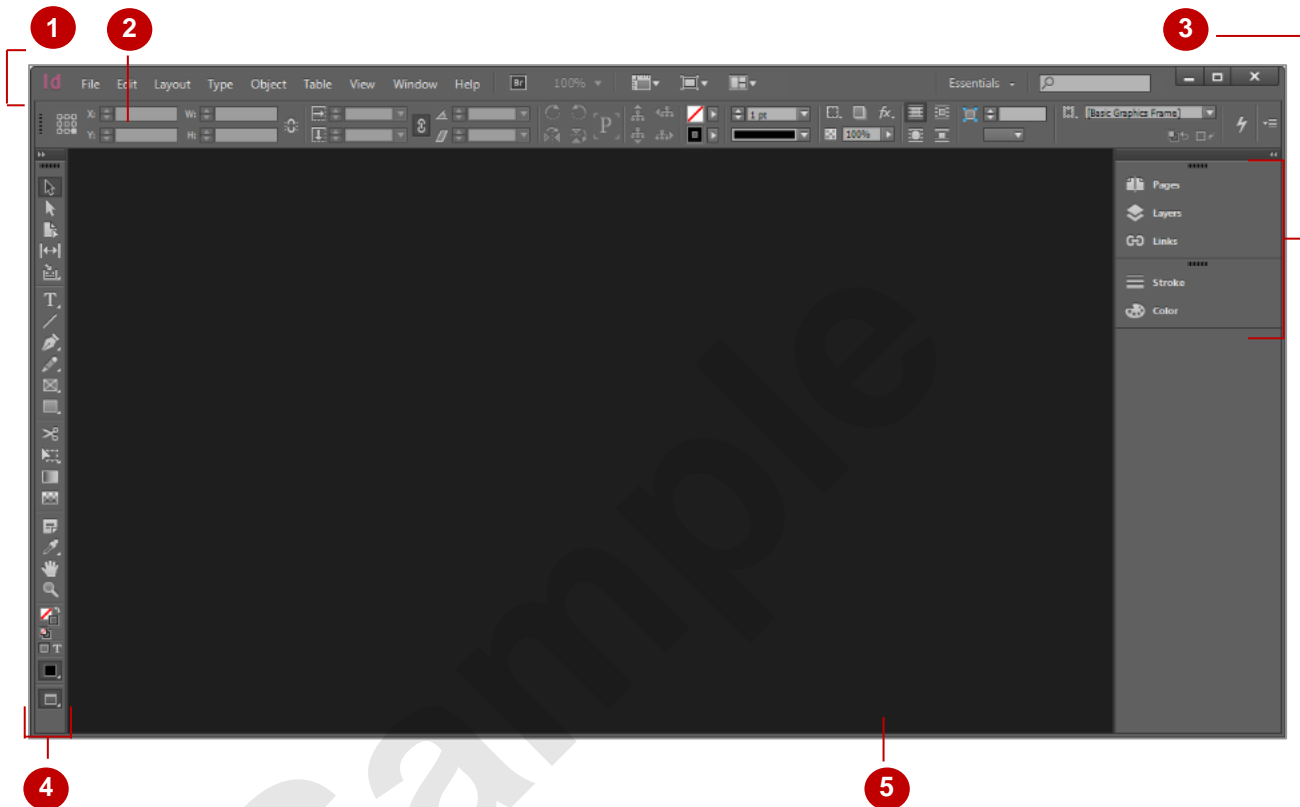
1 The *Application bar* contains the tabs *File*, *Edit*, *Layout*, *Type*, *Object*, *Table*, *View*, *Window* and *Help*. Clicking on a tab displays the relevant menu of options from which you can select commands to create and modify documents. To the right of the application bar there are buttons that provide you with some of the commands found in the application bar so you can save time by quickly locating commands you use frequently.

2 The *Control panel* displays a series of controls that can be used to modify the contents and objects in a document. The controls on the *Control* panel vary depending on the tool currently selected in the *Tools panel*. For example, if the *Type* tool is selected, the *Character Formatting Tools* or the *Paragraph Formatting Tools* will be displayed in the *Control* panel.

3 The *Panel dock* is an area where the available panels can be stored on the screen, making them easily accessible. By default, the *Panel* dock is displayed as titled icons, but can be expanded to display the options available in each active panel. Individual panels or groups of panels can be pulled from the dock and made to float in the document window.

4 The *Tools panel* holds all of the selection, drawing and control tools that you need to work with objects in your document. By default, it appears on the left side of the document window

5 The *Pasteboard* is an area outside the page on which you can place objects or text that you may want to use in the document but which you haven't yet positioned.
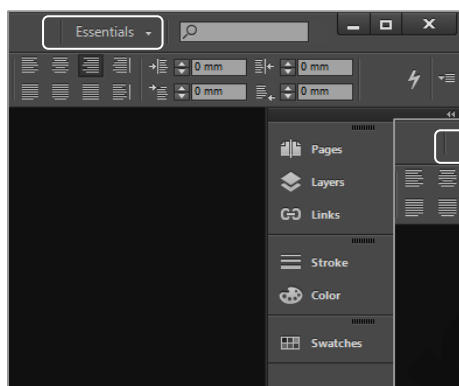
UNDERSTANDING WORKSPACES

The *InDesign workspace* is made up of many features, commands and controls that can be used to create a document and modify and manipulate the contents. Most tools associated with an InDesign workspace can be found in the panel dock on the right side of the InDesign screen.

Available InDesign Workspaces

InDesign CC provides you with seven default workspaces – *Advanced*, *Book*, *Digital Publishing*, *Essentials*, *Interactive for PDF*, *Printing and Proofing* and *Typography*. The *Essentials* workspace is selected by default. Each workspace provides different tools and settings depending on the kind of document the workspace has been tailored for. You also have the option to create your own custom workspace. This is useful if you often work on a particular kind of document and would like to have a certain set of tools available on the screen that you work with frequently.
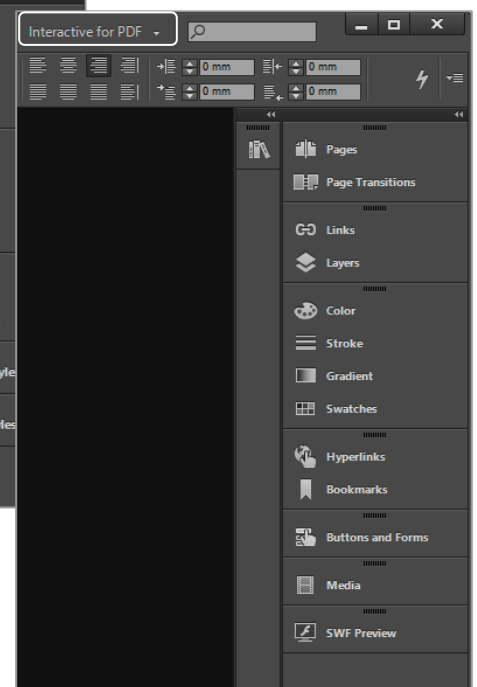
The Advanced workspace provides you with advanced formatting and layout tools such as styles.
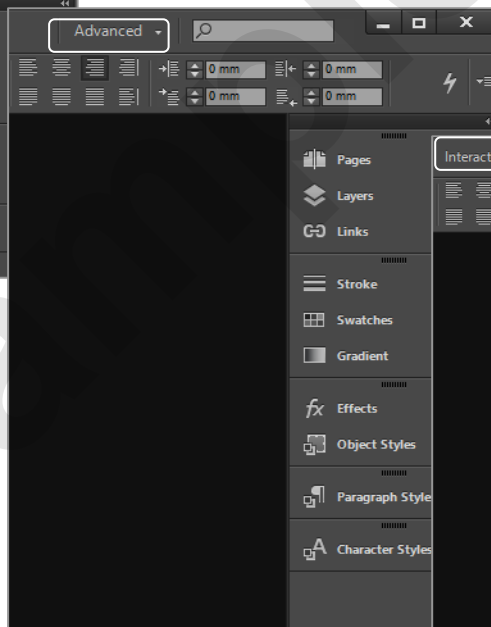
The Interactive for PDF workspace provides you with tools for inserting interactive elements such as hyperlinks and bookmarks.

The Essentials workspace provides you with all of the basic tools you need to get started with any kind of document.

The Panel Dock

The *Panel dock* (displayed at the far right side of a workspace) is where you will notice the most significant changes between workspaces, as each workspace contains slightly different panels. These panels contain groups of related settings and tools.

Modifying Workspaces

InDesign provides you with the ability to modify an existing workspace or create a workspace of your own. If you change your mind about changes you have made to a workspace you can either reset the workspace to the default settings, or delete the workspace (if it is a custom workspace you have created yourself). To access these options simply click on the name of the currently active workspace at the end of the menu bar, then select an option from the drop down menu.

OPENING AN EXISTING DOCUMENT

You will most likely open an existing document so that you can review or modify it. You can open documents using several methods. For example, you can open documents from within InDesign or launch InDesign by opening an InDesign document from *File Explorer*. In this case we will open an existing document so that we can use it to demonstrate the InDesign workspace features.

Try This Yourself:

Before starting this exercise you MUST ensure InDesign has started…

1 Select **File** > **Open** to display the *Open a File* dialog box

2 Ensure *Course Files for Adobe InDesign CC 2014* is selected in file explorer

3 Click on *IN1401 Starting With InDesign_1*, then click on **[Open]**

Leave the document open for the next exercise
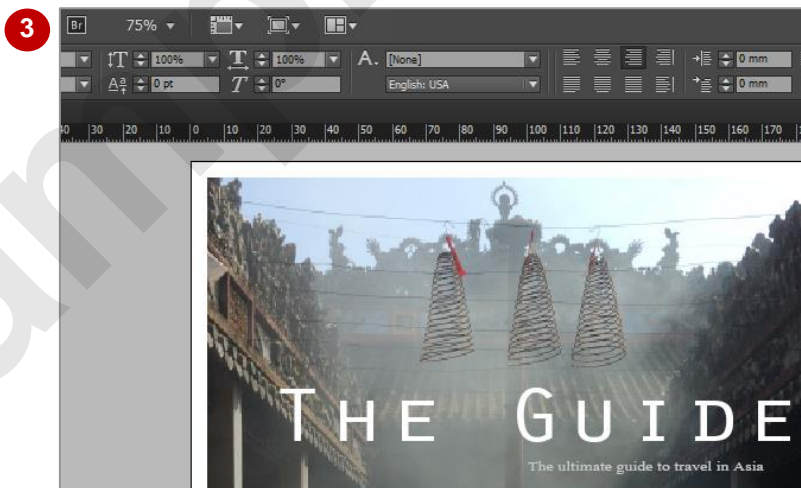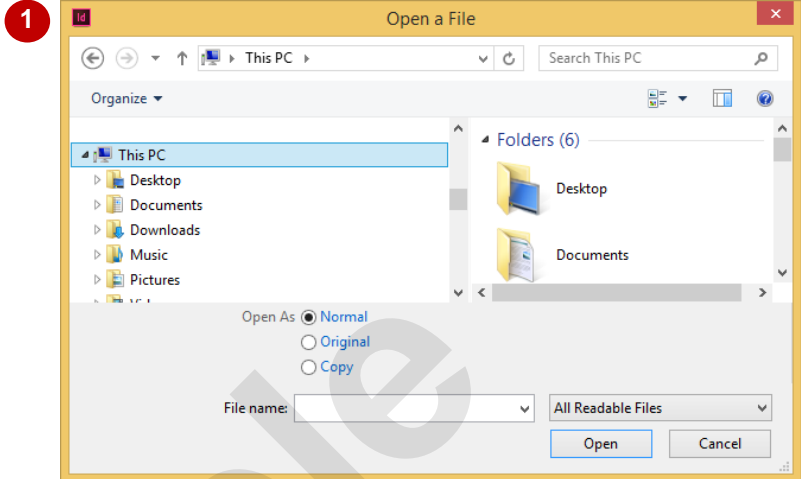
For Your Reference…

To *open* an *existing document*:

1. Select **File** > **Open**
2. Navigate to the required folder
3. Click on the document to open
4. Click on **[Open]**

Handy to Know…

- The keyboard shortcut to display the *Open a File* dialog box is Ctrl + O .

CLOSING A DOCUMENT

To ensure you don't lose any of the work that you have created in InDesign, you should *save* your document on a regular basis. Fortunately, if you try to close a document you have made changes to without first saving it, InDesign will prompt you to save it before closing. You may want to *close* a document once you have completed it or because you have finished working on it for the day.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file IN1401 Starting With InDesign_1.indd...…

1 Select **File** to display a menu of options, as shown

2 Select **Close** to close the document

If there was an asterisk next to the name of the document in the document tab when it was open, this would signify that the document had changes made to it and you would have been prompted to save
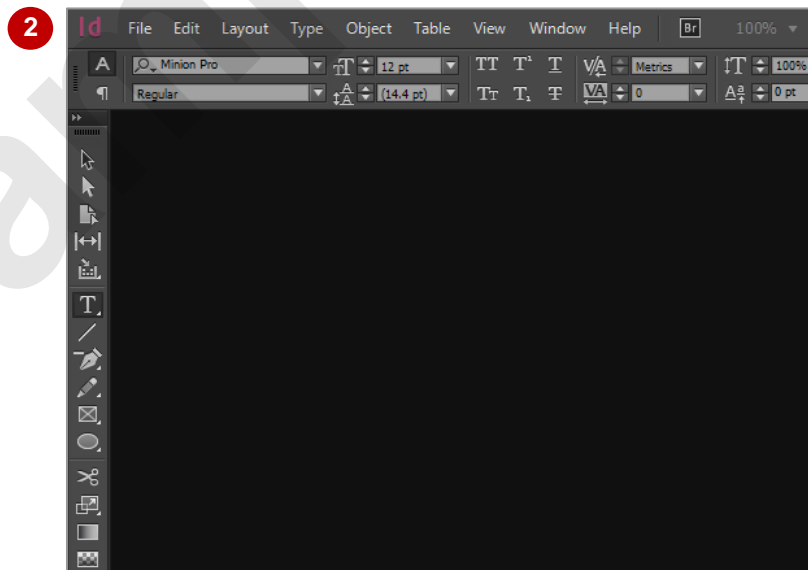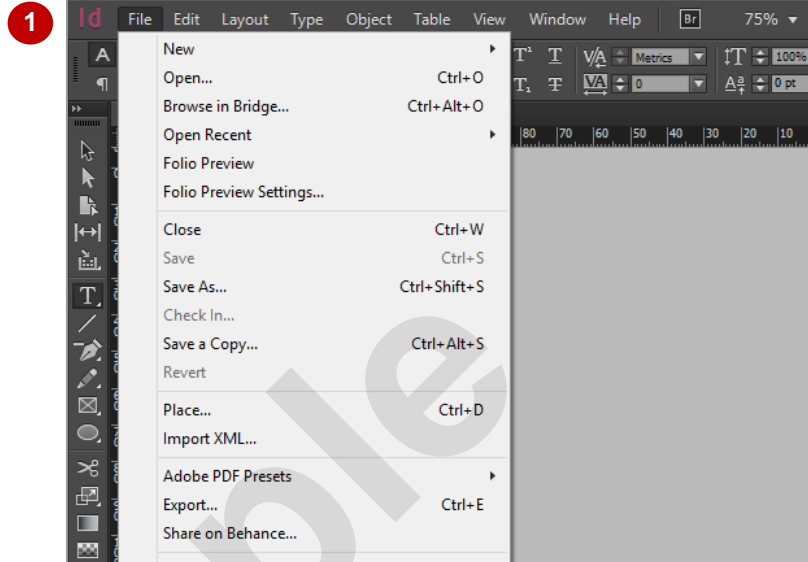
For Your Reference…

To *close* a *document*:

- Select **File** > **Close**

Handy to Know…

- The shortcuts for saving a document and closing a document are Ctrl + S and Ctrl + W respectively.
- You can close a document by clicking on the cross on the document tab.

EXITING INDESIGN

Once you have opened InDesign you will also need to know how to close the application. Leaving an application running in the background while you are working on something else may slow down your computer. Exiting InDesign is very easy.
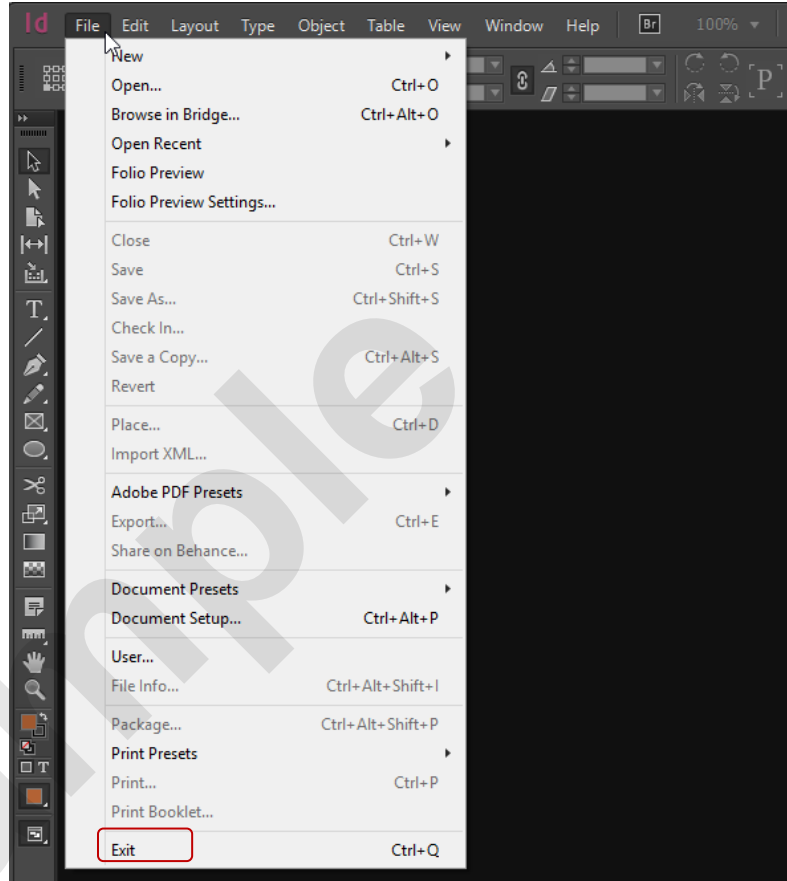
Try This Yourself:

Same File

Before starting this exercise ensure InDesign is active and no documents are open...

1 Select *File* to display a menu of options, as shown

2 Select **Exit**

The Adobe InDesign window will close, thus exiting the application. You could also have used the keyboard shortcut

1

For Your Reference…

To *exit InDesign*
1. Click on *File*
2. Select **Exit**

Handy to Know…

- You can exit InDesign by clicking on the cross icon in the top right corner of the window.

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CHAPTER 2

INFOCUS

SETTING UP A DOCUMENT

In order to work successfully within Adobe InDesign, one must be able to create new documents. There are several basic skills you will need to master in order to achieve this. These include being able to specify the size of the document,the most suitable format for the document, how to save information for future use plus much more.

In this session you will:

✓ gain an understanding of document presets
✓ learn how to adjust the units of measure
✓ learn how to create a new document preset
✓ learn how to create a new document
✓ learn how to use new document preview
✓ learn how to save a new document.

UNDERSTANDING DOCUMENT PRESETS

When a ***document*** is created in InDesign it is usually saved in a file. That file contains not only text and the artwork (graphics) but also a series of pre-defined or new settings known as ***presets*** that determine how the document will look. You should make whatever adjustments are required to these ***presets*** at the time of creating a new document.

New Document Settings

When you create a new document, you can create it from a series of default settings known as ***presets***. For example, the ***Default*** presets shown here specify that:

- The intent is to print the document
- The initial number of pages will be 1
- The page size will be ***Letter*** in portrait orientation
- There will be ***1*** column
- The top, bottom, inside and outside margins will be ***12.7mm***
- There will be no bleed or slug areas (i.e. areas outside the margin used for bleeding edges and comments respectively).

You can use these presets if you wish. Alternatively, you can modify these presets, choose from another preset that you've created or create the document from a template which usually includes settings relevant to specific types of documents such as brochures, flyers, reports, etc.

To modify the settings in the ***New Document*** dialog box, click on the drop arrow for the required setting and select an option or select the value for a setting and type the required value to replace it.