INDESIGN BASICS

Before racing off to create a new document, it is wise to take some time out to study the InDesign document window and the features available in the software. By developing an understanding of the workspace you should be able to create documents more quickly and effectively.

In this session you will:

✓ learn how to start **Adobe InDesign CS6**

✓ learn how to open an existing document

✓ gain an understanding of the **InDesign** workspace

✓ gain an understanding of the features of the **InDesign** workspace

✓ gain an understanding of panels

✓ learn how to display and hide panels

✓ learn how to float and dock panels

✓ learn how to select a different workspace

✓ learn how to save a workspace

✓ learn how to navigate a document

✓ learn how to zoom in to and out of a document

✓ learn how to use keyboard shortcuts

✓ learn how to use a shortcut menu

✓ learn how to save and close a document.

STARTING ADOBE INDESIGN CS6

Adobe InDesign CS6 is an application program that can be *started* in Microsoft Windows by selecting it from the *Start* menu, by double-clicking on an icon on the desktop, or by opening an existing document that was created in InDesign. In this exercise we will show you how to open *InDesign* from the menu.

Try This Yourself:

Open File

Before starting this exercise you MUST ensure that Windows has started...

1 Click on the Windows *Start* button, located in the bottom left corner of the screen, to display the *Start* menu

2 Click on **All Programs** to display the menu, then select **Adobe InDesign CS6** to launch the application

Your Start menu may vary to the one described here. For instance, InDesign may have been installed with a suite of other Adobe products such as Photoshop, Acrobat, etc...

After InDesign is loaded, a panel will be displayed. From here you can select from a range of options for opening a document, including recent ones you've been working on. For now, we'll just open InDesign without a document...

3 Click on *Close* 🗙 to close the panel

An empty document window will now be displayed
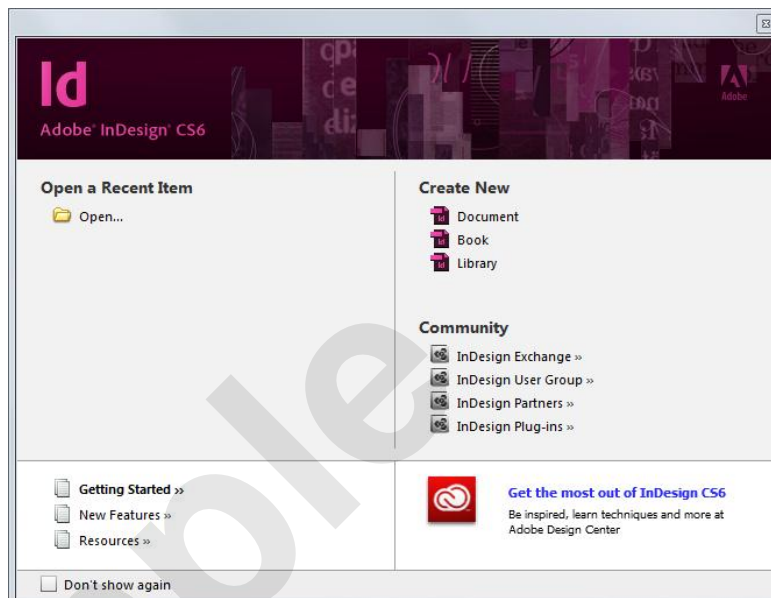
2

*The **screen** above shows how the Start panel would look after starting a brand new install of InDesign. If the InDesign on your computer has been used previously to create documents recent documents that have been saved will appear in the **Open a Recent Item** section at the left of the panel.*

Note for Mac Users:

*The main way to start Adobe InDesign CS6 on a **Mac** is to either select it on the **Dock** at the bottom of the screen, or to access it through the **Launchpad** (which can be found on the Dock).*

*You can also start it through **Finder** or use the **Search** icon on the menu bar but these ways are more tedious.*

For Your Reference…

To *start Adobe InDesign CS6* in Windows:

1. Click on the Windows *Start* button
2. Select **All Programs**
3. Select **Adobe InDesign CS6**

Handy to Know…

- In Microsoft Windows you can pin an application to the first page of the *Start* menu. Simply right-click on the application in *All Programs* and click on *Pin To Start Menu*.

OPENING AN EXISTING DOCUMENT

Documents can be opened in Adobe InDesign in several ways. You can open them from within InDesign itself, or launch InDesign by opening an InDesign document from Windows Explorer. You would most likely **open an existing document** so that you can review or modify it. In this case we will open an existing document so that we can use it to demonstrate the InDesign **workspace** features.

Try This Yourself:

Open File

*Before starting this exercise you MUST ensure that InDesign has started...*

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

2 Click on the drop arrow for **Look in**, click on **(C:)**, then double-click on **Course Files for Adobe InDesign CS6** to open the folder

Your dialog box will show many more files than appear here. We have reduced the number here to avoid clutter…

3 Click on **N151 InDesign Basics_1.indd**, then click on **[Open]**

This document was created from one of the standard templates in InDesign. Don't worry if you can't read it – the placeholder text is in Latin!

4 Click on **Maximise** ▫, if necessary, to make the best use of the available space
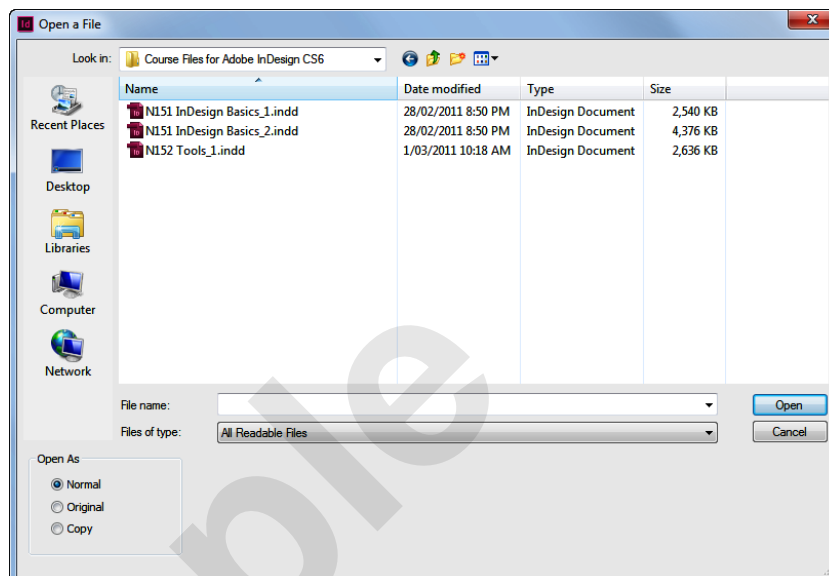
For Your Reference…

To **open** an existing document:

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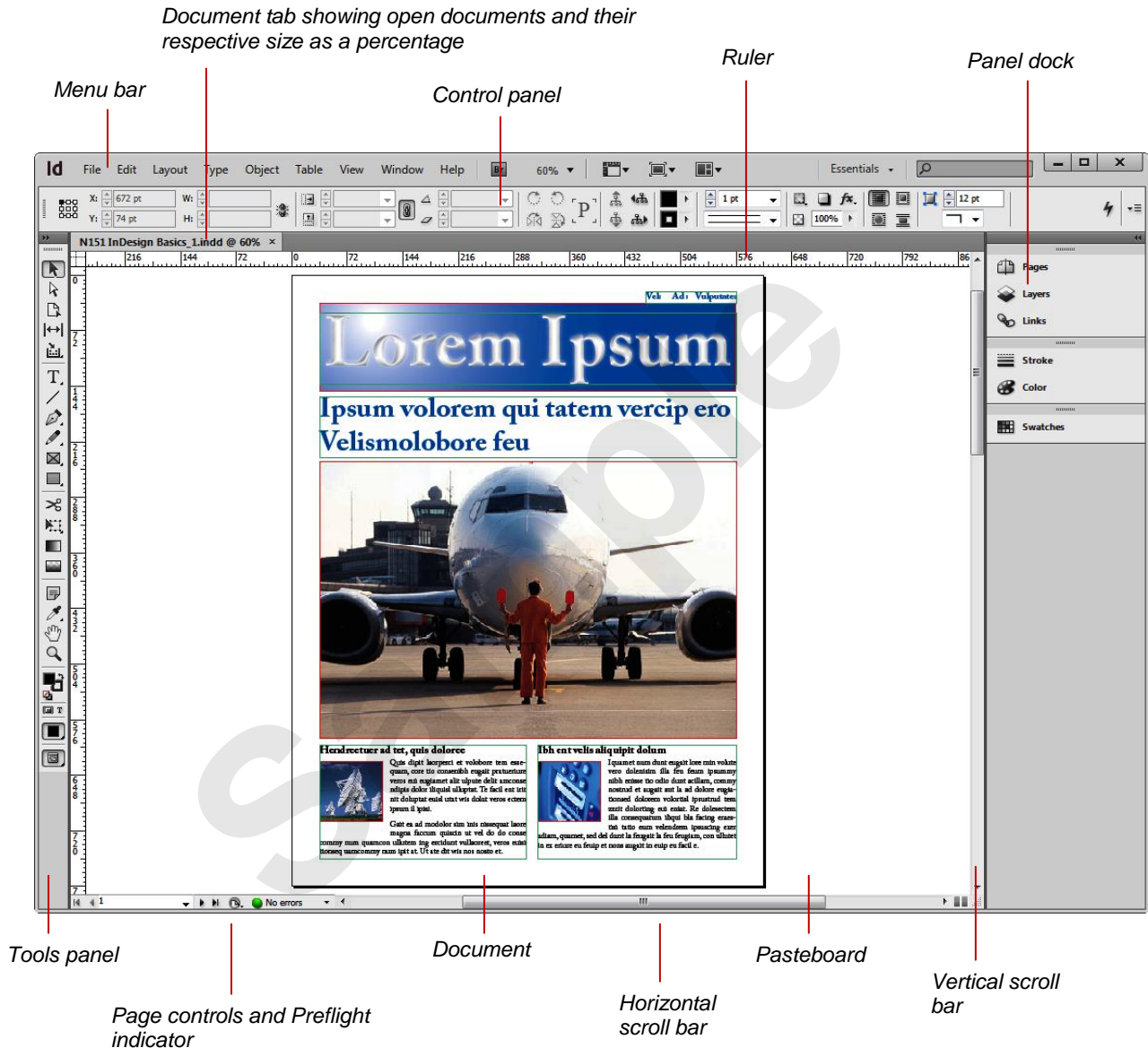4. Click on **[Open]**

Handy to Know…

- The shortcut key to display the **Open a File** dialog box is `Ctrl` + `O` in **Microsoft Windows**, or `⌘`+ `O` on a **Mac**.

THE INDESIGN WORKSPACE

In Adobe jargon the InDesign screen is referred to as a *workspace* because it is here that you lay out and work on your document. It consists of many areas such as a menu bar, a control panel which allows you to change settings, a panel which contains things such as palettes and document layouts, a pasteboard, and of course, the page or pages of a document.

Document tab showing open documents and their respective size as a percentage

Ruler

Panel dock

Menu bar

Control panel

Tools panel

Document

Pasteboard

Vertical scroll bar

Page controls and Preflight indicator

Horizontal scroll bar

EXPERT ▶

If you'd like to see what is new in Adobe InDesign CS6 select **Window** > **Workspace** > **New in CS6** *on the menu bar at the top of the screen.*

UNDERSTANDING THE INDESIGN WORKSPACE

The ***InDesign workspace*** is made up of many features, commands and controls that can be used to create a document, and create and manipulate the contents. The table below describes some of the features found in the ***InDesign workspace*** as shown on the previous page.

Feature	Description
Document tab [showing the document name @ current zoom]	The ***Title bar*** appears at the top of the window. It displays the name of the application, Adobe InDesign CS6, followed by the name of the document. It also shows the percentage zoom at which the document is currently being viewed. This is important because documents in InDesign can vary enormously in size, unlike word processors where the page is most often A4. The zoom percentage tells you at a glance how close the display is to 100% or actual size.
Menu bar	The ***Menu bar*** provides a series of options from which you can select commands. Above the menu bar are a series of buttons which enable you to quickly adjust the view of the workspace and/or the document, without having to locate the same options in the menu bar.
Control panel	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.
Rulers	The horizontal and vertical ***rulers*** show the size and position of objects on the page. They can be used to create ***ruler guides*** and to help with the placement of objects.
Panel dock	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.
Tools panel	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.
Pasteboard	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.
Page controls and Preflight indicator	The ***Page controls*** show the page number of the currently displayed page and provide buttons to move to the next, previous, first and last spread – a spread is a collection of pages that are shown at the same time, for example, a two-page spread. You can also type a specific page number in the ***Page Number*** box and press ⟨Enter⟩ to go directly to that page.
	Within the ***Page controls***, the ***Error*** button enables you to see at a glance if there are any problems with your document. For instance, if a story is not placed entirely in a text frame, or if a graphic extends off the edge of a page, the ***Error*** button will display a red button 🔴.
Document	The ***Document*** is displayed in the InDesign workspace and is the area which will appear when printed. Objects and text are placed on the page to create the document.
Horizontal scroll bar	The ***Horizontal scroll bar*** is used to move left and right across the document window to view different parts of the document.
Vertical scroll bar	The ***Vertical scroll bar*** is used to move up and down the document window to view different parts of the document.

UNDERSTANDING PANELS

Because there are so many settings in a document that you may want to access quickly, InDesign provides a vast number of *panels* that you can display in the document window. A *panel* displays a group of related settings, such as a list of colours that you have selected for a particular document. This page discusses *panels*, how they are categorised and how they are used.
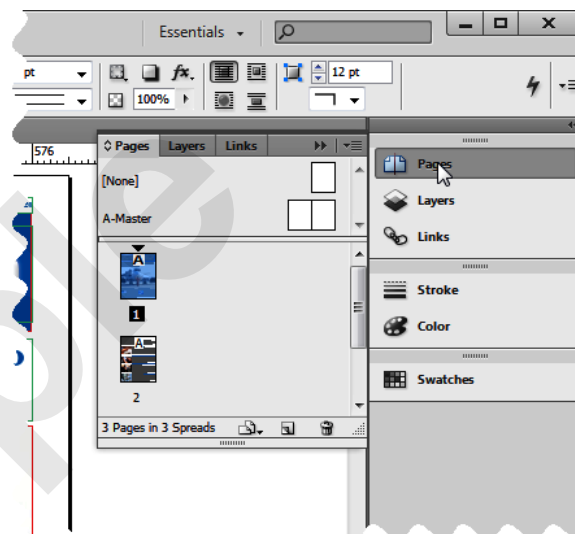
Panels

Panels (sometimes also called *palettes*) are a collection of commands, controls, settings or options that apply to a particular aspect of a document. A panel takes the form of a window and may or may not include a menu. A menu is indicated by the menu button 🔽☰ which appears in the top right-hand corner of the panel.

Panel States

A panel can appear on the InDesign document window in various states. It may appear as a window or a tab, depending upon the settings chosen for each panel and how the panels appear by default. *Panel* states include:

Full	Also known as normal view. All commands and options are visible.
Abbreviated	Only a few rows are visible because the size of the panel has been reduced.
Collapsed	None of the commands are visible, only the title of the panel.
Floating	The panel appears as a floating window somewhere on the screen.
Docked	The panel dock appears on the right-hand side of the screen. This means that the panels are effectively attached to the side of the window. Docked panels can be displayed in full, or collapsed to icons.

In this example, the panels are displayed in their default, docked position. The panel group containing the Pages, Layers and Links panels has been expanded, by clicking on the Pages icon.

Available Panels

There are many panels to work with, each of which has many settings and options. Here is a list of the panels that you can choose from the **Window** menu. Some of the panels are grouped by function. For example *Animation*, *Bookmarks* and *Hyperlinks* are grouped as *Interactive* panels.

Articles	**Interactive**	**Object & Layout**	**Styles**	**Utilities**
Colour	*Animation*	*Align*	*Cell Styles*	*Background Tasks*
Colour	*Bookmarks*	*Pathfinder*	*Character Styles*	*Data Merge*
Gradient	*Buttons and Fonts*	*Transform*	*Table Styles*	*Script Label*
Swatches	*Hyperlinks*	**Output**	**Text Wrap**	*Scripts*
Control	*Liquid Layout*	*Attributes*	**Tools**	*Tags*
Editorial	*Media*	*Flattener Preview*	**Type & Tables**	*Tool Hints*
Assignments	*Object States*	*Preflight*	*Character*	
Notes	*Page Transitions*	*Separations Preview*	*Conditional Text*	
Track Changes	*Preview*	*Trap Presets*	*Cross-References*	
Effects	*SWF*	**Pages**	*Glyphs*	
Extensions	*Timing*	**Stroke**	*Index*	
Kuler	**Layers**	*Object Styles*	*Paragraph*	
Folio Builder	**Links**	*Paragraph Styles*	*Story*	
Info	**Mini Bridge**		*Tables*	

DISPLAYING AND HIDING PANELS

Given that each document you create will vary in purpose and design, the tools that you use for each will probably also vary. Therefore it makes sense to be able to *display and hide panels* as you need them. Panels that you are likely to use frequently, such as *Swatches*, you might leave visible on the screen, but others such as *Text Wrap* would be opened only when you need them.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1. Select **Window** > **Text Wrap** to display the *Text Wrap* panel which appears as a *floating* panel

2. Double-click on the *Text Wrap* title tab to abbreviate the panel

3. Double-click on the *Text Wrap* tab again to collapse the panel

4. Double-click on the *Text Wrap* tab again to expand the panel

   You can click on ⬧ next to the tab title, for the same effect...
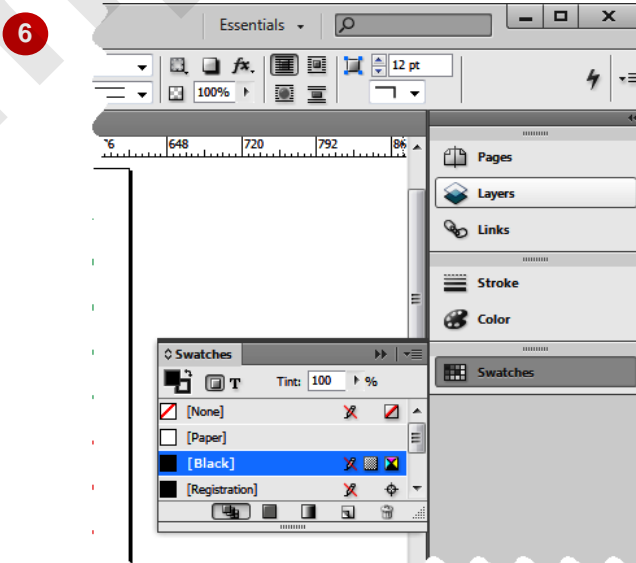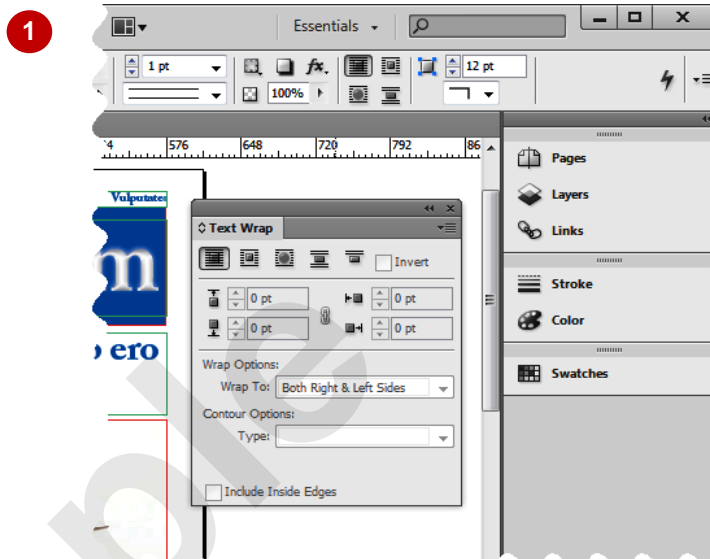
5. Click on *close* ⊠ to close the panel

   Panels can also be docked...

6. Select **Window** > **Colour** > **Swatches**

   This displays the Swatches panel which is "docked" on the right side of the window...

7. Click on *Swatches* in the panel dock to hide the panel

   You can use either the Window menu or an option in the panel dock to hide and show panels

For Your Reference…

To *display* a panel:

1. Select **Window** > *[panel name]* OR click on the panel in the panel dock

To *hide* a *panel*:

1. Select **Window** > *[panel name]* OR click on the panel in the panel dock OR click on ⊠

Handy to Know…

- You can use keyboard shortcuts to display and hide panels. For instance, `F5` is used to display and hide the *Swatches* panel. The keyboard shortcuts for the panels are listed next to the panel name in the **Window** menu.

- You can press `Tab` to hide/show all panels, including the *Tools* and *Control* panels.

FLOATING AND DOCKING PANELS

To give you greater flexibility in setting up your workspace, you can move panels around the screen to suit the document you are working on. For example, you may like to *float* the *Swatches* panel over your work while you apply colour and then *dock* it back on the panel dock on the right-hand side of the screen, when you have finished.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 Move the mouse pointer over *Pages* in the panel dock, then click and drag the mouse onto the screen

The panel will separate from the panel group and panel dock...

2 Release the mouse to float the panel

3 Using the grey title bar area at the top of the pane, drag the *Pages* panel around the window

This enables you to position it anywhere on the screen...

4 Using the grey title bar at the top of the pane, drag the *Pages* panel over the *Layers* panel in the panel dock

A blue line indicates where the panel will be positioned...

5 Release the mouse button to re-dock the *Pages* panel which should appear regrouped with the *Layers* panel and the *Links* panel
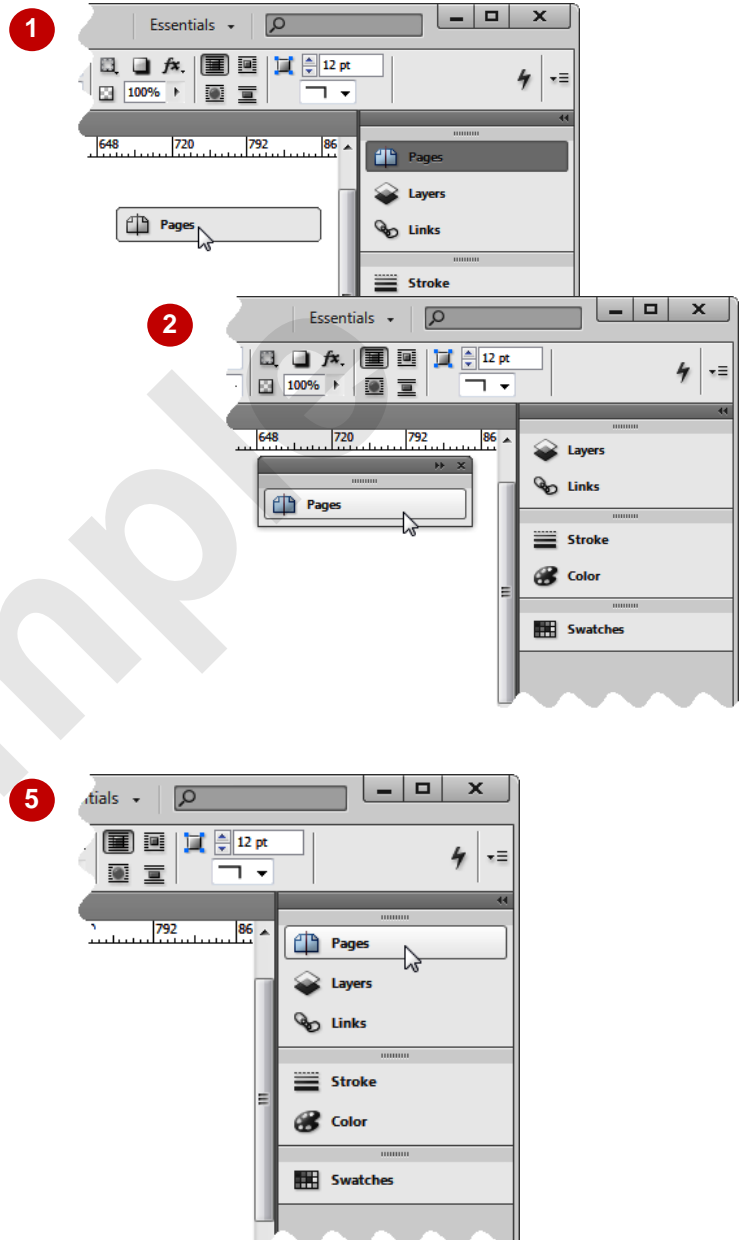
For Your Reference…

To *float* a panel:

1. Click and drag the panel heading from the dock onto the screen

To *dock* a *panel*:

1. Click and drag the panel by the tab into the panel dock

Handy to Know…

- A panel group is a collection of panels. Each group has a darker grey bar which is the header bar for the group. Although it is early days yet, you can create a new panel group by dragging a panel to the very top or bottom of the dock, or by positioning it between two panels.

WORKING WITH WORKSPACES

The InDesign screen layout is known as a *workspace*. A workspace can be changed by manipulating panels, displaying rulers and the like. This allows you to have different screen layouts for specific types of documents or tasks. There are several workspaces already built into Adobe InDesign and the name of the current one is displayed at the top of the screen.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 Click on **[Essentials]** at the top of the screen to see a list of available workspaces

2 Click on *Printing and Proofing* to see the settings in this workspace

3 Click on **[Printing and Proofing]** which now appears at the top and click on *New in CS6* to see this workspace

4 Click on **[New in CS6]** and click on *Essentials* to return to the default workspace

5 Select **Window** > **Text Wrap** to see the *Text Wrap* panel

Let's see how this change is remembered…

6 Click on **[Essentials]** again and click on *Printing and Proofing* to change from the *Essentials* workspace. Click on **[Printing and Proofing]** and click on *Essentials* to see how the changes made in step *5* have been remembered

7 Click on **[Essentials]** and click on *Reset Essentials* to return the *Essentials* workspace to its default settings
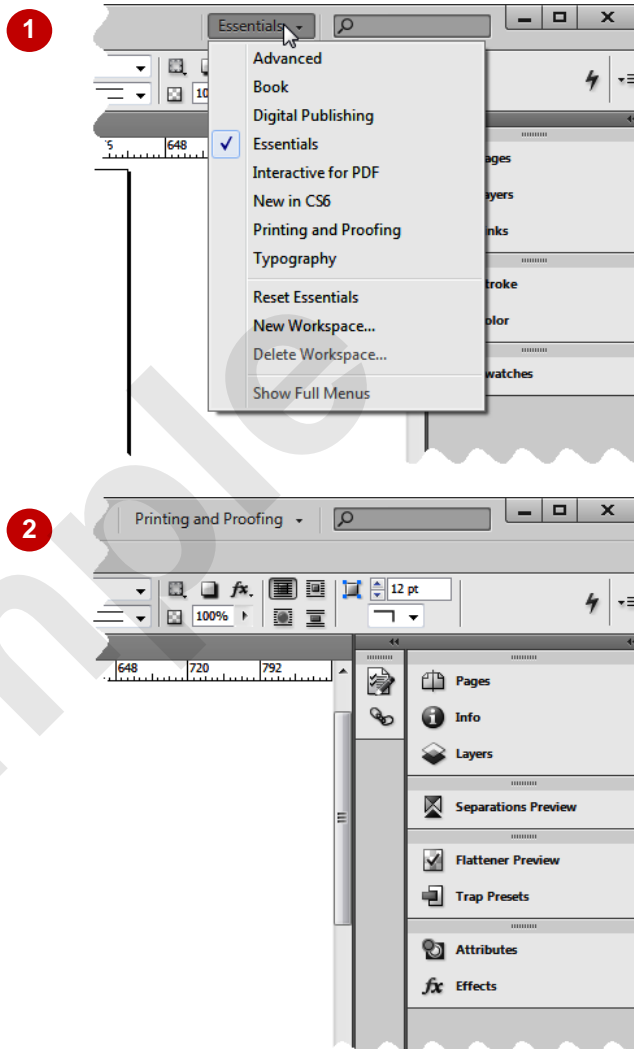
For Your Reference…

To select a *different workspace*:

1. Click on the name of the current workspace at the top right of the screen
2. Click on the name of the desired workspace

Handy to Know…

- The name of the current workspace always appears at the top of the screen. It acts as a button which displays all of the other available workspaces and options for working with workspaces.

CREATING A CUSTOM WORKSPACE

Even though Adobe InDesign has a number of useful workspaces already built in you can create your own **custom workspaces** 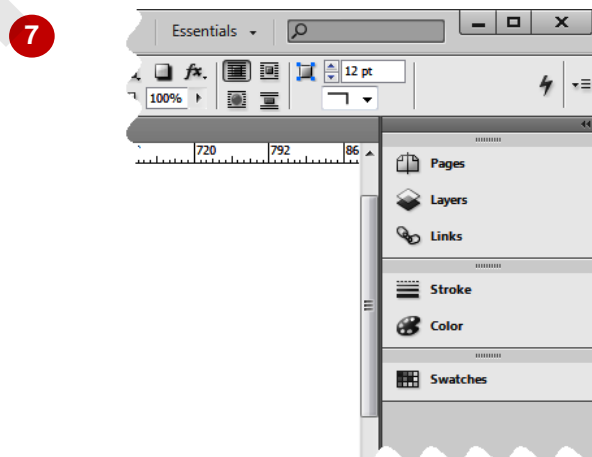as required. Mo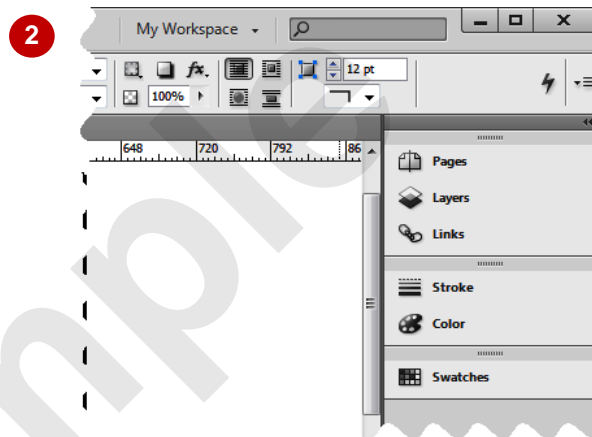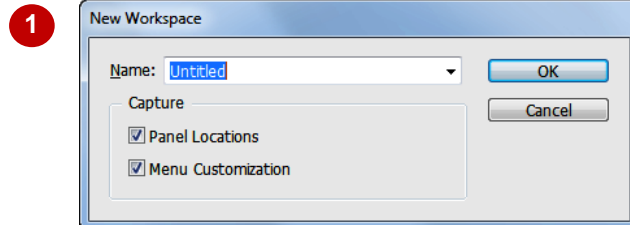st document designers have their own specific needs in regard to the way they work or the type of document they create. Creating a custom workspace can save considerable time switching panels and changing other settings.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 Select **Window** > **Workspace** > **New Workspace** to display the *New Workspace* dialog box

2 Type **My Workspace** and click on **[OK]**

The name of the new workspace will appear at the top of the window. Now we can make some changes…

3 Select **Window** > **Text Wrap** to display the *Text Wrap* panel

4 Select **Window** > **Object & Layout** > **Align** to display the *Align* panel

5 Select **Window** > **Workspace** > **Essentials** to display the original workspace

6 Select **Window** > **Workspace** > **My Workspace** to see the customised arrangement again

7 Click on **[My Workspace]** and select *Essentials* to see the default arrangement

1

New Workspace

Name: Untitled

Capture
☑ Panel Locations
☑ Menu Customization

OK   Cancel

2

My Workspace

7

Essentials

For Your Reference…

To *save* a *customised workspace*:

1. Select **Window** > **Workspace** > **New Workspace**
2. Type a name for the workspace
3. Click on **[OK]**

Handy to Know…

- You can also create a new workspace by clicking on the name of the current workspace and choosing *New Workspace*.

NAVIGATING A DOCUMENT

Documents can vary in size from a single page to many pages. In addition to the actual pages of a document, the document may also include master pages on which the layout and content of the document's pages are based. To make working with documents easier, you should have a good understanding of how to get from one page to another. This is called *navigation*.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file N151 InDesign Basics_2.indd...

1. Press `Pg Dn` to move down a screen

2. Hold down `Alt` and press `Pg Dn` to change to a 2 page spread

3. Select **Layout** (note the navigation options and their shortcuts) and select **First Page**

4. Click on *Pages* in the panel dock, scroll down and double-click on the page *6* icon to jump to that page

5. Click on *Pages* in the panel dock to close the panel

   There are also navigation controls at the bottom of the InDesign window...

6. At the bottom of the screen click on the drop arrow for the page number and click on *10*

7. Click on *Next Spread* to display the next double page

   These buttons include Next, Last, First and Previous Spread...

8. Double-click in the page box and type *1*, then press `Enter` to go to this page
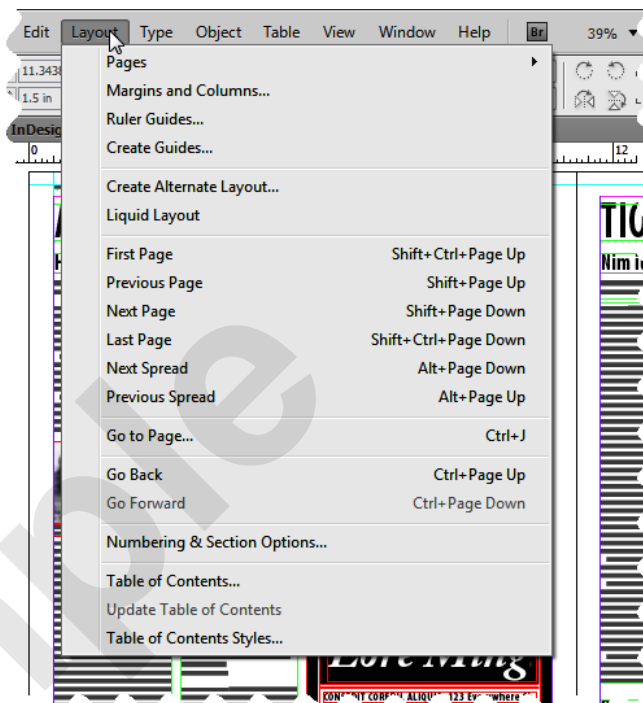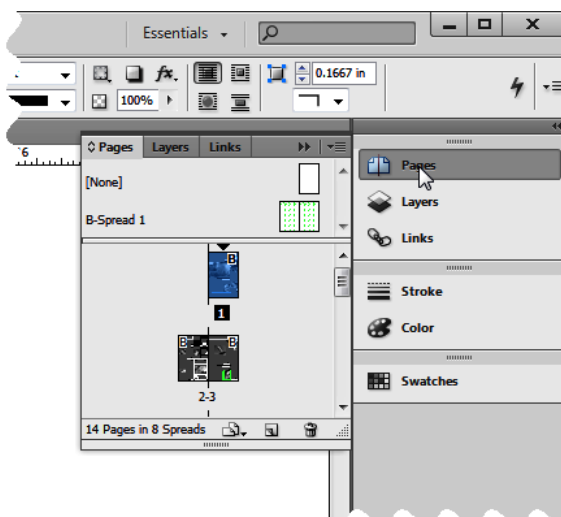
For Your Reference…

To *navigate* a *document*:

1. Use the **Layout** menu, a keyboard shortcut, the *Pages* panel or the page navigation box at the bottom of the screen, to select or move to a page or spread.

Handy to Know…

- A spread is a set of pages viewed together. For instance, a spread might be a set of two facing pages as in a book.

- You can also rotate a page or spread, rather than twisting your head to the side! Select **View** > **Rotate Spread** and then select a rotation option.

ZOOMING A DOCUMENT

Effective documents rely on the detail being just as accurate as the overall layout. *Zooming* refers to magnifying part of a document so that you can examine the details as well as being able to zoom out so that the entire two page spread is visible on the screen. In Adobe InDesign there are several key commands that enable you to *zoom in and out* quickly to different levels of magnification.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file N151 InDesign Basics_2.indd...

1 Press `Ctrl` + `0` (zero) to fit the page in the window

2 Press `V` to activate the **Selection** 🔺 tool, then click on the picture of the woman's face to select it

3 Select **View** > **Zoom In**

4 Press `Ctrl` + `=` several times, until zoom is set to **150%** – check the zoom in the document tab

5 Press `Ctrl` + `-` to zoom to **100%**

You can also use the Zoom tool...

6 Click on the drop arrow 🔽 for **Zoom Level** in the **Application bar** and select **12.5%** to show several spreads

7 Click on the value in **Zoom Level**, type **90** and press `Enter` to zoom to this magnification

8 Hold down `Ctrl` + `Space`, then click and drag to draw a marquee around the photo of the woman – release the keys to zoom in to the selected area

9 Hold down the `Ctrl` key and press `1` to zoom to **100%**

4 *Note that the current zoom level (150%) is shown alongside the name of the document in the document tab (above the document)*

For Your Reference…

To *zoom* a *document*:

- Select **View** > **Zoom In** OR press `Ctrl` + `=`
- Select **View** > **Zoom Out** OR press `Ctrl` + `-`
- Click in *Zoom Level*, type a specific zoom % and press `Enter` **OR** click on the drop arrow 🔽 and select a zoom %

Handy to Know…

- Zoom to *100%* by pressing `Ctrl` + `1`.
- InDesign CS6 has a great power zoom facility. Select the *Hand* tool ✋, then click and hold on the page to zoom out. Keep holding and move the zoom area marquee across the page. Release the mouse to resume the original zoom.