

TOPIC Outline: Session #1

Adobe InDesign CS4
(Windows and Macintosh)

Desktop Publishing Services, Inc.
Instructional Materials developed by Eda Warren

Reset all defaults to Adobe's original settings

I. Working in InDesign

- A. Tools panel
 - 1. "Fly-out" tools
 - 2. Tools panel configurations
- B. Panels: [new in CS3]
 - 1. Panel groups
 - 3. Docking and collapsing panels
 - 4. Panel menus
 - 5. Panels "views"
 - 6. Save your workspace (panel layout)
- C. Control panel—object and text modes, panel menu
- D. Application bar: view options, screen mode, arrange docs [new in CS4]
- E. Changing pages
 - 1. Pages popup menu or type a page number
 - 2. Buttons for Next page/Previous page/First page/Last page
 - 3. Pages panel—reconfigure for improved screen space
- F. Navigating
 - 1. Zoom tool and Hand tool—keyboard shortcuts
 - 2. Zooming incrementally
 - 3. Power zoom [new in CS4]
 - 4. View % popup menu
 - 5. Navigator panel
 - 6. Fit in Window
- G. Working with multiple docs open in InDesign [new in CS4]
 - 1. Tabbed documents: easily navigate from one to another
 - 2. View multiple docs simultaneously
- H. Pasteboard
- I. Undo and Redo: multiple levels

II. Publication process

- A. File menu > New
 - 1. Page setup: number pages, facing pages, page size, orientation, margins, columns
 - 2. Changes to above settings for current doc
 - Document Setup
 - Pages panel menu
 - Margins and Columns
 - 3. Setting program defaults (settings affect all new documents)
- B. Master pages—for repeating items
 - 1. Purpose of master pages
 - 2. Make a footer
 - a. Create a text frame
 - b. Ruler guides:
 - c. Auto page numbering
 - d. Style the footer
 - 3. Make copy of footer for right page—fast method
 - 4. Repeating graphics or "rules" on master pages
 - a. Multiple item selecting using Select tool
 - b. Vertically adjust position of objects

- C. Place an entire text story automatically—Autoflow
- D. Formatting text
 - 1. Highlight entire story
 - 2. Type specifications:
 - Control panel, Character and Paragraph views
 - 3. Preferences—change settings for better type control
- E. Photos & graphics
 - 1. Importing graphic—no frame required
 - 2. Place multiple files at the same time [new in CS3]
 - 3. Text wrapping around rectangular picture
 - 4. Fitting commands: positioning image in frame
 - 5. Scale imported graphic proportionally by dragging
 - 6. Crop image
 - 7. Open/edit a linked graphic or image in its original program
- F. Viewing modes: Preview and Normal

III. Survival skills

- A. Selection tool vs. Direct Selection tool
 - 1. Selection tool—selecting, bounding box, moving, sizing
 - 2. Direct Selection tool—path editing
 - 3. Temporary access to your last-used selection tool
 - 4. Stacking order
 - Select an object that is behind another selected object
 - Arrange commands—change stacking order
- B. Select multiple objects—2 methods
- C. Group/Ungroup and selecting nested groups

IV. Printing—8 panels of printing options

TOPIC Outline: Session #2

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I. Publication process

- A. "New": 4 pgs, facing pages, no master text frame, 3 columns
 - Bleed and Slug area
- B. Master pages
 - 1. Draw text frames for each column
 - 2. Duplicate frames and Paste in Place
 - 3. Convert graphic frames to text frames
- C. Controls for master items on document pages
(more on master pages in Session #3)
 - 1. Show or Hide Master items on a document page or spread
 - 2. Select a master item on a document page
- D. Add pages—Pages panel menu> Insert Pages
- E. Make sections with different styles of page numbering
 - 1. Set formatting of page numbering for each section
 - 2. Sections: reducing number of master pages needed
 - 3. Printing using Sections
- F. Place text manually—without master text frames
- G. Link text from column-to-column, and page-to-page
- H. Format body text with Control panel
- I. Create large reverse headline
 - 1. OpenType: cross-platform, special features
 - 2. Size type from keyboard: large and small increments
 - 3. Units & Increments preference—size in units of one point
 - 4. Text wrap around headline frame
 - 5. Inset Spacing: set distance of text inside to the frame
 - 6. Other Text Frame Options
- J. Tracking and kerning—letter and word spacing
 - Range Kerning: Metrics and Optical kerning
- K. Apply color to text
 - 1. Swatches panel: preset colors you can apply or modify
 - 2. Apply color to type without highlighting text
 - 3. Fills and Strokes
 - 4. Stroke weight for the text frame
 - 5. Remove color from Fill or Stroke
 - 6. Swap Fill and Stroke colors
 - 7. Restore default colors—no fill, black stroke
- L. Gradients: add gradient to highlighted text (or to selected shape)
 - 1. Gradient panel options:
 - reverse, angle, replace default gradient colors
 - 2. Gradient tool
 - 3. Multicolor gradients

II. Word processing features—Place text file first

- A. Info panel and Story Editor
- B. Check Spelling
 - 1. Dynamic Spelling
 - 2. Autocorrect
- C. Show Hidden Characters: word spaces, Return characters, tabs
- D. Find/Change
 - 1. Search options
 - 2. Text cleanup: GREP Queries [[new in CS3](#)]
 - a. Remove double spaces & multiple Returns
 - b. Special Characters popup menu
 - 3. Attribute searches: replace underline style with italic
- E. Bulleted and numbered lists—automatic, with advanced features [[new in CS3](#)]

III. Typographic features and type effects

- A. Paragraph attributes
 - 1. Alignments
 - 2. Indents: left indent, right indent and first line indents
 - 3. Paragraph spacing: Space Before and Space After
 - 4. Drop cap
- B. Optical Margin Alignment
- C. Hyphenation and Justification
 - 1. Adobe Paragraph Composer
 - 2. Hyphenation settings: flush-left and justified text
 - 3. Justification settings
- D. Vertical and Horizontal scaling of text
- E. Baseline Shift
- F. Skew text
- G. Vertically justify text within a text frame ("feathering")
- H. Text frame options
 - 1. Number of columns
 - 2. Gutters
 - 3. Inset Spacing (distance of text to the frame)
 - 4. First Baseline Offset

IV. Help system: InDesign's robust built-in help resource

Alternate CS4 Topic

View rotated pages for easier editing with rotated content

TOPIC Outline: Session #3

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I. Layout techniques

- A. Unlink and rethread text frames
 - 1. Show Text Threads—see the linking path
 - 2. When not to unlink
 - 3. Break link in story between two text frames
(on same page or on different pages)
 - 4. Link story to a new frame
 - 5. Automatic page numbers for story jumps
(continued on page X; cont. from pg X)
- B. Layout Adjustment to change layout of existing InDesign file
- C. Column, frame and page breaks—insert “break characters”

II. More on graphics

- A. Check scale factor of imported image
- B. Text wrapping around silhouetted or cutout image/graphic
- C. Place multiple graphics as a contact sheet [new in CS4]
- D. Place a graphic into the flow of text (“anchored graphic”)
- E. “Round-trip “ graphic editing to/from your preferred application
[new in CS4]
- F. Anchored graphics: position anywhere on page, but anchored
to the text so graphic stays with text as it is edited
- G. Object Styles—save production time
- H. Links to imported graphics for correct output [enhanced in CS4]
- I. GREP: instantly change the look of multiple objects with the
same attributes [new in CS3]

III. Tabs

- A. Import tabular text: File> Place
- B. Set tabs
- C. Adjust tabs, leader tabs, equal-interval tabs

IV. Paragraph Styles: greatest DPT tool—fast formatting, consistent type specs & easy changes

- A. Open file with existing styles
- B. Apply a style
- C. Modify a style
- D. Create a style from scratch
- E. Character Styles
- F. Local formatting and removing two ways
- G. Redefine a selected style based on altered sample text
- H. Nested paragraph styles
- I. Underline and Strikethrough Options
- J. Selectively add styles from another InDesign doc
- K. Down and dirty styles: Eyedropper

V. Working with color—beyond the basics

- A. Apply gradients to editable text, fill or stroke
- B. Add a spot or process color to Swatches
- C. Make a tint—on the fly or for reuse
- D. Apply last gradient
- E. Apply last used solid color
- F. Remove colors from Swatches panel
- G. Import colors (spot, process colors & gradients) from other
InDesign, Illustrator or Illustrator EPS documents
- H. Mixed Ink support: mix two or more colors together

VI. Advanced Master Pages

- A. Create a new master spread
- B. Duplicating and “based-on” masters
- C. Other Pages panel menu commands
 - 1. Panel Options
 - 2. Insert Pages
- D. Applying master pages—using Pages panel
 - 1. Apply master to both pages of a spread
 - 2. Apply master to only one page
 - 3. Hide master items from one page of a spread
 - 4. Apply a master to multiple pages
 - 5. Show or hide master items on a spread
 - 6. Delete a master
- E. Controlling master page items on document pages
 - 1. Edit a master item on a document page
 - 2. Detach a selected master object from its original master
 - 3. Detach all master objects on the current spread
 - 4. Restore original master items on document pages
 - 5. Delete a master page item on a document page

Alternate CS4 Topics

- Smart Guides, Smart Dimensions, Smart Spacing, Smart Cursors:
Work more quickly to align, space, rotate and resize multiple objects;
shows you dimensions, and X & Y values for page position, width, height

TOPIC Outline: Session #4

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I. Transparency and Effects

- A. Apply to Object, Fill, Stroke and Text [new in CS3]
- B. Effects panel and effects on Control panel [new in CS3]
- C. Blend modes
- D. Drop Shadow button [new in CS3]
- E. Flattener Preview panel
- F. Outputting pages with transparent effects

II. Tables

- A. Tables overview
- B. Creating a table—inserting and placing
- C. Creating a table—converting tabular text
- D. Break up the table into multiple linked tables
- E. Table headers
- F. Add text
- G. Add graphics
- H. Format the table—structurally
- I. Moving rows or columns
- J. Table and cell styles [new in CS3]
- K. Style the table—adding strokes and fills to a table
- L. Navigating tables
- M. Selecting cells, rows, columns, table text with the Type tool

III. Basic drawing tools: Rectangle, Ellipse, Polygon, Line, Pencil, Smooth, Erase tools

- A. Lines & shapes
- B. Draw from center-out: Rectangle, Ellipse, Polygon and Line tools
- C. Constrain drawing, moving and sizing

IV. Stroke Styles

- A. Overview
- B. Stroke panel menu > Stroke Styles

V. More on selecting shapes

- A. Selecting filled or unfilled shapes
- B. Select commands
- C. Group Selection tool

VI. Transformations: Move, Scale, Rotate and Shear

- A. Simple transforms with “bounding box”
- B. Transform part of a selected object with Direct Select tool
- C. Free Transform tool—simple transforms
- D. Transformation tools: Rotate, Scale, Shear
 - 1. Point of origin
 - 2. Transform around default point of origin
 - 3. Constrain proportionally
 - 4. Transform numerically using default point of origin
 - 5. Transform numerically using a new point of origin
 - 6. Transform a copy numerically from default point of origin
 - 7. Transform a copy numerically from a new point of origin
- E. Transformation panel: Window menu > Transform

VII. Live Preflight check [enhanced in CS4]

- A. Purpose of preflight
- B. Preflight options
- C. Tips help you correct production problems

VIII. Packaging files for hand off to a service provider

- A. InDesign puts together all fonts and linked graphics
- B. Two methods to get to Package command

IX. Export your InDesign file as a PDF document

- A. Recommended settings for high resolution output
 - 1. General panel
 - 2. Compressions
 - 3. Marks & Bleeds
 - 4. Advanced: Color management, Fonts, OPI, Transparency
 - 5. Security: Passwords and permissions
- B. Add page transitions to exported PDF & SWF (Flash) files
[new in CS4]

X. Export to Dreamweaver and Flash

Make your InDesign file ready for web-delivery

Additional topics also available

- Long document creation:
 - Book feature (for multiple files of a long document, enabling page numbering, table of contents, indexing and printing)
 - Table of Contents
 - Library feature (store often used logos, pictures, boilerplate text in an external file that can be shared and standardized)
 - Indexing
 - Footnotes
- More on InDesign's Bezier drawing/editing tools
- InDesign's Help system