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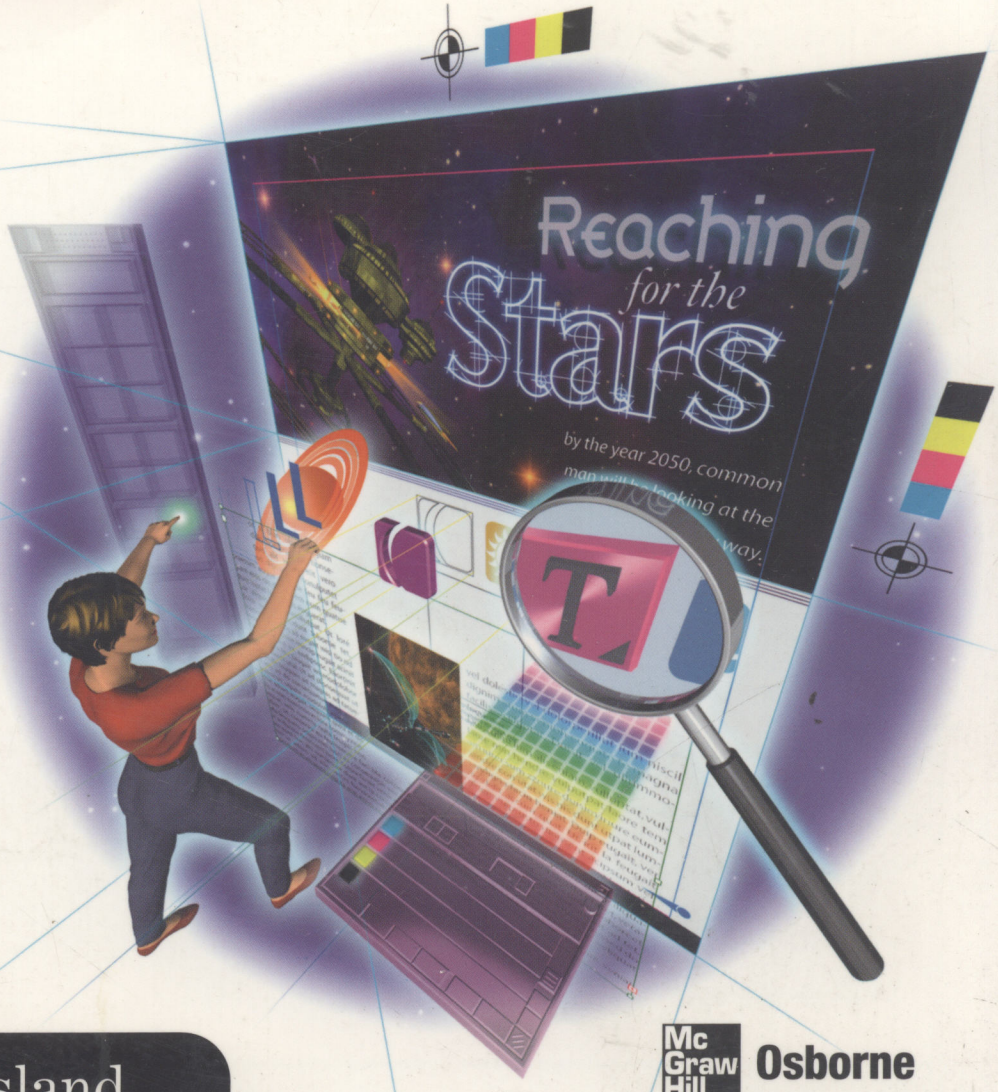

David Bergsland

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How to Do *Everything* with

Adobe® InDesign® CS

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Dedication

I dedicate this to the women in my life:
Pastor Pat, Elizabeth, Ann, Lauren, and Taylor. What a joy they are.
(And I'm sure Kevin, Jacob, and Dylan are not jealous.)

About the Author

David Bergsland has been working in printing and publishing since 1967. With a B.F.A. from the University of Minnesota in 1971, he has built a career as a graphic designer, an author, and a teacher. Since 1991, he has taught at the Albuquerque Technical Vocational Institute. He was hired to take over and revitalize the commercial printing program—bringing it into the digital age. In 1996, he developed the school's Business Graphics and Communication program, which combines print, Web, and multimedia training into a single degree. He designs the class materials for the program and teaches about 300 students a year.

David has written seven books on digital publishing, including *Introduction to Digital Publishing*, *Publishing with InDesign*, *Publishing with Illustrator and FreeHand*, and *Publishing with Photoshop*. He has been on the alpha team for InDesign since 1999. For relaxation, he designs and sells fonts through MyFonts.com and fonts.com.

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Acknowledgments

First and foremost, I acknowledge my wife, Rev. Patricia H. Bergsland. I assure you that she has earned the title merely by putting up with me. Her wisdom and love are my strength and joy.

My agent, Jawahara Saidullah, did a marvelous job of getting me this book and has been a strong support throughout its production. Megg Morin has been a wonderful acquisitions editor as we roamed through the capabilities of InDesign and the production department at Osborne. Athena Honore kept me in the loop and managed the huge pile of files I was throwing at Osborne. Madhu Prasher straightened out all production problems. And, I can't say enough about Marilyn Smith's editorial abilities. She made this book coherent. This was the first book I have ever been required to fit into a preexisting format. In fact, this is the first book I have not written, designed, and formatted (including creating the fonts and graphics), and then produced the final digital documents. I had a lot to learn. I have a new appreciation for book production as a team sport, instead of a fine-art experience.

It was a difficult book. Not only were we dealing with the vagaries of alpha software, but I lost two hard drives in the midst of production. With one, I lost everything. In addition, I had to install and learn Windows XP Professional. That was an experience! I have a new appreciation for the ability of my PC students to bear pain.

Introduction

This book covers the software that has given us the largest step forward in page layout capabilities since QuarkXPress 3 delivered the knockout punch to PageMaker 4. You could be reading this book for a variety of reasons. You may have realized that what you are doing cannot really be done in Word or is too clumsy to do in QuarkXPress. Or perhaps you are finally ready for the upgrade from PageMaker. Of course, if you are upgrading from an earlier version of InDesign, you've already proved your wisdom.

InDesign CS is the page layout application for people who need to make their documents look professional. As you will come to understand from this book, InDesign has far surpassed the capabilities of QuarkXPress, the page layout application of the last millennium.

InDesign has many powerful capabilities, including some that are completely unavailable outside Adobe:

- Full transparency
- Tables that can be formatted and flow like text from column to column and page to page
- Unlimited undo of almost everything
- Paragraph-level justification of copy for greatly improved type color
- Optical margin alignment
- Automatic optical kerning
- OpenType support for automatic features like true small caps, oldstyle figures, fractions, swashes, and ligatures
- Nested master pages
- Completely customizable shortcuts and workspace arrangements
- A built-in word processor
- Mixed spot-color swatch sets
- Custom-drawn screen previews of exceptional quality
- Separation and overprint previews
- Direct PSD import with transparency (we no longer need clipping paths)

- Direct export of prepress-quality PDFs, as well as interactive PDFs with movies and sound
- Solid scripting, tagging, and XML support

And this list is by no means complete. The only downside is the current lack of competition. It's an exciting new world for page layout.

A Brief History of Digital Page Layout Design

For the past decade, we have been watching the world of professional graphic design convert entirely to digital output. This transition has already occurred in the business office environment, but the world of professional printing is much more complex than the world of the office. The entire process has been a challenge, to say the least. Let me give you a quick, nonscholarly history of events.

In the beginning, with the Mac in 1984, desktop publishing was just a gleam in the eye of many people. The Mac would have died except for desktop publishing. Aldus, in the form of PageMaker, along with Adobe's PostScript and the Apple LaserWriter, saved the day. In fact, Paul Brainerd, the head of Aldus, is credited with coining the phrase *desktop publishing*.

By 1990, PageMaker, and PostScript (fonts, laser printers, and imagesetters) were absolutely dominant. PageMaker's interface was designed by and for designers. People like the McWades and Ole Kvern were in on the beginnings. Aldus itself was named after the publisher of the original italic font (created in northern Italy during the Renaissance).

However, as great as PageMaker was, it had some serious flaws. One of its competitors gave it a roundhouse in 1991, with the release of QuarkXPress 3, which actually supported CMYK and separations. It didn't matter that PageMaker caught up with version 4.2 in a matter of months. Quark was the buzz, and PageMaker was the old thing. You could hardly run Quark without hundreds, if not thousands, of dollars of Xtensions, but it didn't matter. The graphic designers switched to digital about that time, and they would not be caught dead using the old software. They all wanted Quark. When printer companies and service bureaus started converting to digital production, all they received were Quark files.

There were a few other applications. Letraset's ReadySetGo made a little run. FrameMaker developed a following in the bureaucratic, scientific community because it could set equations, footnotes, and other technical necessities. On the PC side, Ventura Publisher gained industrial muscle, but it was never a serious contender, because Windows wasn't. Windows didn't fully support PostScript until Windows 2000. (That should give you an idea of why Macs dominate desktop publishing, although with Windows XP Professional, the PC side finally has a mainstream operating system that can compete head to head.)

By the mid-1990s, PageMaker, QuarkXPress, Freehand, Illustrator, and Photoshop were producing virtually all the professional output sent to printers. But after Adobe purchased Aldus in the late 1990s, it basically pulled the plug on PageMaker. Ole Kvern has said that Adobe purchased Aldus because of that company's developments, which ended up with InDesign. Rumors started floating around about the new Quark Killer, K2, that Adobe had in the works. Fantastic capabilities were whispered about. InDesign was supposed to be a simple plug-in manager that could be updated radically very quickly. There was a lot of truth to the rumors.

In the new millennium, a new tool for professional page layout has become available. I mentioned what QuarkXPress did to PageMaker in the early 1990s. What Quark did then, InDesign is now doing to Quark. Forget the earlier rumors you heard of versions 1 and 1.5. By InDesign 2, Quark was of historical interest, used by those unable to keep up (for whatever reason). InDesign CS is yet another huge upgrade, as major as the leap from InDesign 1.5 to 2.

From the outset, InDesign has been completely cross-platform. In fact, it is the only application that can read either PC or Mac fonts (just drop them into the Fonts folder in the InDesign application folder). We haven't had type and page layout this good—ever.

Who Is This Book For?

An InDesign CS book must serve a wide variety of readers. Some of you are coming from the business world, having been told that you are now doing the newsletter and you are doing it with InDesign. This book will tell you everything you need to know to get started in the production of printable professional documents. The explanations of features will assume some background knowledge in typography and printing history. For that, I recommend my earlier book, *Introduction to Digital Publishing*.

Most of you are graphic designers with various levels of experience in digital production using QuarkXPress, PageMaker, or earlier versions of InDesign. This book is designed for you. You might be tempted to skip some of the basic stuff, but you need to be careful, because a lot of the basics have been radically improved. For example, the New Document dialog box now allows you to set custom preset page sizes, plus you can set bleeds, slugs, and margin locks in the presets.

I think you will find this book an excellent resource. My goal was to answer all your questions about the software, while providing guidance to those new to the industry. I will show you the most efficient and productive ways to use InDesign, so you can compete in our deadline-driven and budget-conscious industry. I will not only point out what works and how I think it is best used, but what doesn't work and why you should avoid it.

How Is This Book Organized?

This book includes 18 chapters, organized into 6 parts, to take you from starting up the software through producing your final publication.

Part I, Get Started with InDesign CS This part covers the InDesign interface—what it contains, how to control it, and how to customize it. It also explains how to open documents, including those from QuarkXPress and PageMaker.

Part II, Add Typography The five chapters in this part are devoted to the core of graphic design: typesetting. Along with the basics of adding and editing type, you'll learn about InDesign's superior typography features, including OpenType, paragraph-level justification, and optical margin alignment. OpenType is going to change your whole approach to setting type, with true small caps, oldstyle figures, true fractions, superiors, inferiors, superscript, subscript, discretionary ligatures, swashes, multiple languages, and more. InDesign's powerful Story Editor, paragraph styles, and table features are also covered in this part.

Part III, Add Graphics Most designers are used to importing graphics made in other applications into a page layout program. Although InDesign makes it easy to bring in art from Photoshop, Illustrator, FreeHand, and other applications, it also provides some very useful graphics-creation capabilities, based on the same PostScript drawing techniques as FreeHand and Illustrator. This part describes how to use InDesign's drawing and graphic-editing tools, as well as how to import and export graphics.

Part IV, Add Color The two chapters in this part focus on the complexities of designing with color. It describes InDesign's masterful ability to apply color, primarily controlled by the Swatches palette, which is unprecedented in power—in any application. You'll also find solutions for common problems with color printing, ranging from handling separations and duotones to ensuring proper registration and trapping.

Part V, Design Web and Multimedia Documents This part concentrates on InDesign's Web and interactive PDF features. It explains how to add hyperlinks, buttons, movies, and sound clips to your documents. There are also plenty of tips on designing for the Web.

Part VI, Produce Finished Documents This part takes you through the process of using InDesign's page layout capabilities and your knowledge of design to assemble the pieces, prepare the document for production, and produce your final output. These chapters include information to help you design your document to suit the capabilities of its output device, whether it's an in-house laser printer, a high-end imagesetter or platesetter, or anything in between. You'll also learn how to export PDFs and use InDesign's printing options.

Throughout the book, you'll see several different types of sidebars:

- *How to...* sidebars provide step-by-step instructions for tasks.
- *Did you know?* sidebars give you extra information about a variety of related topics.
- *For Newcomers* sidebars explain page design fundamentals that people new to page design may find enlightening.
- Note icons point out additional information.
- Tip icons point out tips to help you work more quickly and efficiently.
- Caution icons point out some areas that could cause problems.
- Shortcut icons point out shortcut keys.
- Unique to InDesign icons point out features that you won't find in other page layout programs.
- Tips for Quark Users icons point out features that help Quark users make the transition to InDesign.
- New to InDesign CS icons point out new additions to this version of InDesign.

You'll find exercises to practice your skills throughout the book. Additionally, I am offering the tutorials from the book on my web site at http://kumo.swcp.com/graphics, so that you can download the pieces. E-mail me at graphics@swcp.com if you have any questions.

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