

# 1 Getting to Know the Work Area



*To make the best use of the extensive drawing, layout, and editing capabilities in Adobe InDesign, it's important to learn how to navigate in the work area. The work area consists of the document window, the pasteboard, the toolbox, and the floating palettes.*

In this lesson, you'll learn how to do the following:

- Work with tools, document windows, the pasteboard, and palettes
- Change the magnification of the document
- Navigate through a document
- Work with layers
- Use context menus and online Help
- Use Adobe online services

**Note:** *This lesson covers tasks that are common to Adobe products such as Photoshop, Illustrator, and Acrobat®. If you are familiar with these Adobe products, you may want to skim through this lesson and move ahead to the next lesson.*

## Getting started

In this lesson, you'll practice using the work area and navigating through pages of the *Exploring the Library* booklet. This is the final version of the document—you won't be changing or adding text or graphics, only checking to make sure everything is ready for print. Before you begin, you'll need to restore the default preferences for Adobe InDesign.

**1** To ensure that the tools and palettes function exactly as described in this lesson, delete or deactivate (by renaming) the InDesign Defaults file and the InDesign SavedData file. See “Restoring default preferences” on page 2.

**2** Start Adobe InDesign.

To begin working, you'll open an existing InDesign document.

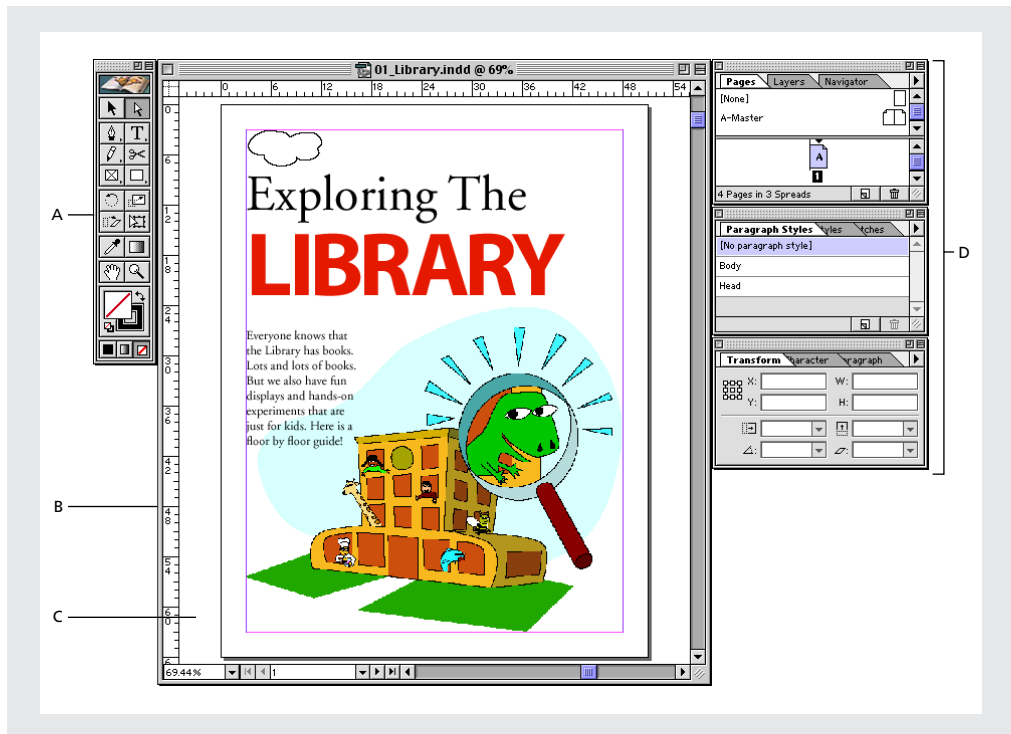
**3** Choose File > Open, and open the 01\_a.indd file in the ID\_01 folder, located inside the Lessons folder within the IDCIB folder on your hard disk. If an alert message appears that asks which dictionary file you want to use, click No (Windows) or Document (Mac OS).

**4** Choose File > Save As, rename the file **01\_Library.indd**, and save it in the ID\_01 folder.

**Note:** *This document was saved with the frame edges hidden (View > Hide Frame Edges). By default, frame edges are visible in all documents.*

## Looking at the work area

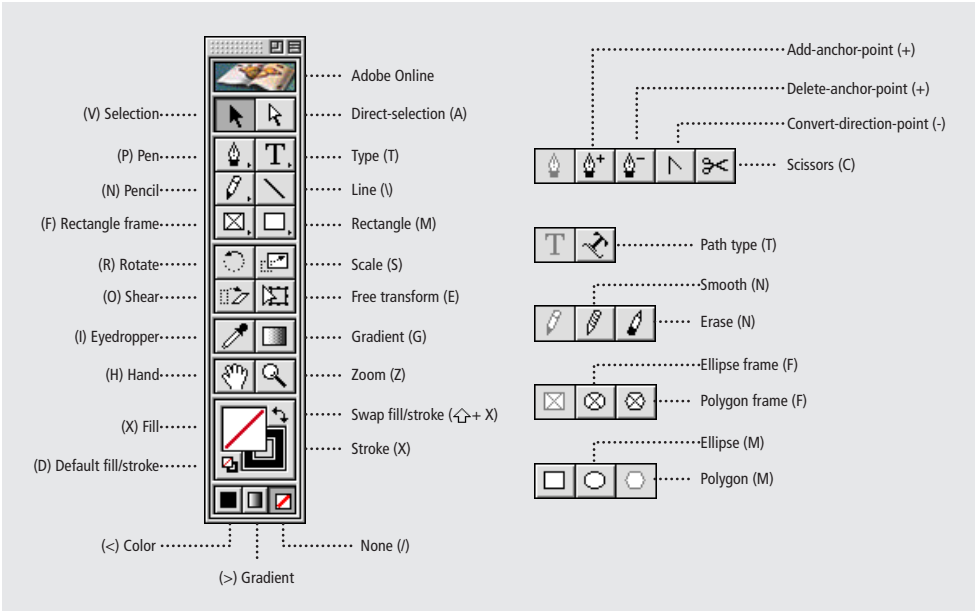
InDesign's work area encompasses everything you see when you first open or create a document: the toolbox, document window, pasteboard, and palettes. You can customize the work area to suit your work style. For example, you can display only the palettes you frequently use, minimize and rearrange palette groups, resize windows, add additional document windows, and so on.



A. Toolbox B. Document window C. Pasteboard D. Palettes

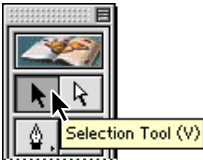
## Toolbox

The InDesign toolbox contains tools for selecting objects, working with type, drawing, and viewing, as well as controls for applying and changing color fills, strokes, and gradients.

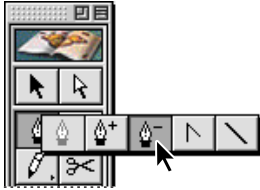


As you work through the lessons, you'll learn about each tool's specific function. Here you'll familiarize yourself with the toolbox and the tools.

**1** Position the pointer over the selection tool (⏏) in the toolbox. Notice the name and shortcut are displayed. You can select a tool by either clicking the tool in the toolbox or pressing the tool's keyboard shortcut.



2 Position the pointer over the pen tool and hold down the mouse button—additional pen tools appear. Drag to the right and release the mouse button over one of the additional tools to select it. Any tool that displays a small black triangle at the bottom right corner contains additional tools.



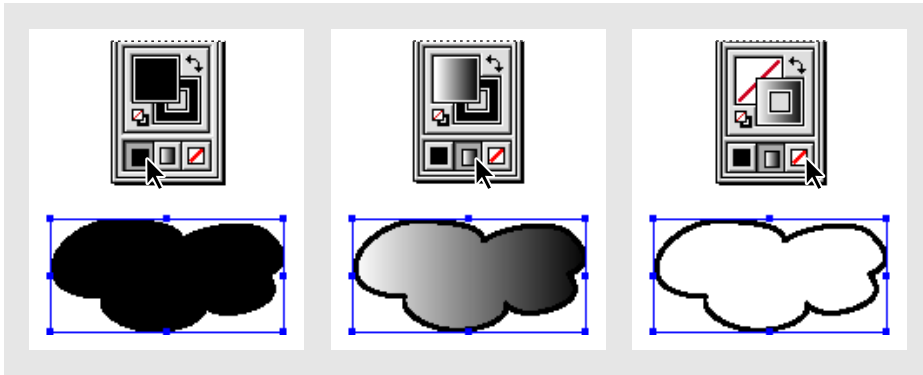
3 Select the selection tool again; then click the little cloud in the top left corner of page 1 to select it.

Now you'll use the color controls, which are located on the bottom half of the toolbox.

4 Select the Fill box to make sure any changes you make affect the center portion of the object and not its stroke.



- 5 Click the Color box (■) in the toolbox. The object becomes filled with solid black. Click the Gradient box (▣). The object becomes filled with a white-to-black gradient. Click the None box (□) to return the object to its original unfilled state.



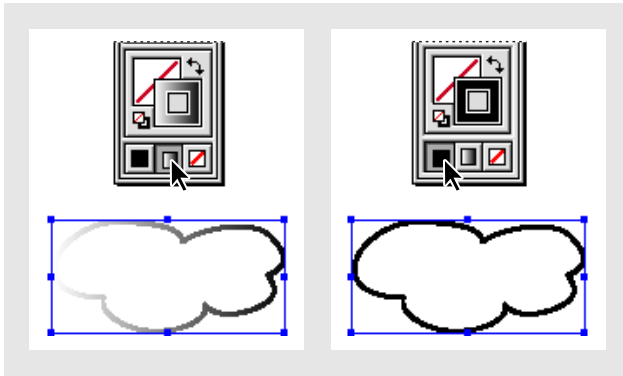
*Object filled with black (left), filled with a gradient (center), and reset to no fill (right).*

**Note:** If you accidentally double-click a Fill or Gradient box, the Fill or Gradient palette will open. Close the palette to continue with the lesson.

- 6 Now select the Stroke box (▣) so that any changes you make affect the object's stroke.



- 7 Click the Gradient box (■) in the toolbox. The solid stroke becomes a gradient stroke. Click the Color box (■) to return the object to its original stroke.



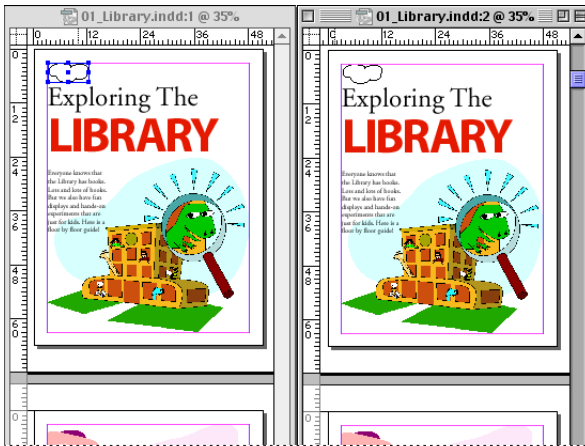
To learn how to change the color of a fill, stroke, or gradient, see “Creating and Applying Colors, Tints, and Gradients” on page 133.

## Document window

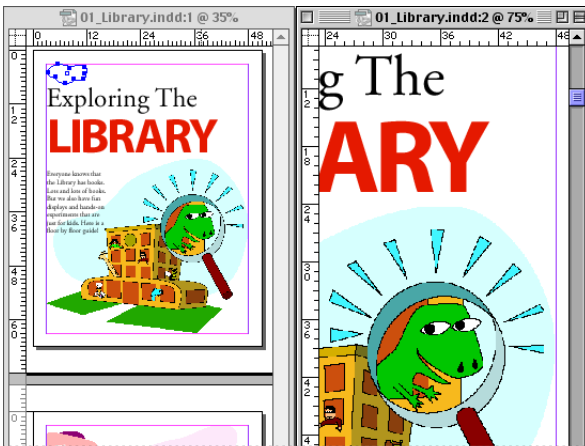
The document window contains your document pages. You set margins for the document when you first open a new document, and then you place, type, or create all text and artwork on the document pages. You can have more than one document window open at a time. Here, you’ll open a second window so you can see two different views of the document at the same time as you work.

- 1 Choose Window > New Window. A new window titled 01\_Library.indd:2 opens.

2 To view both windows simultaneously, choose Window > Tile.



3 Now select the zoom tool in the toolbox (🔍) and click twice on the dinosaur in the right-most document window. Notice how the original document window remains at the original magnification. This arrangement lets you work closely on details and see the overall results on the rest of the page.



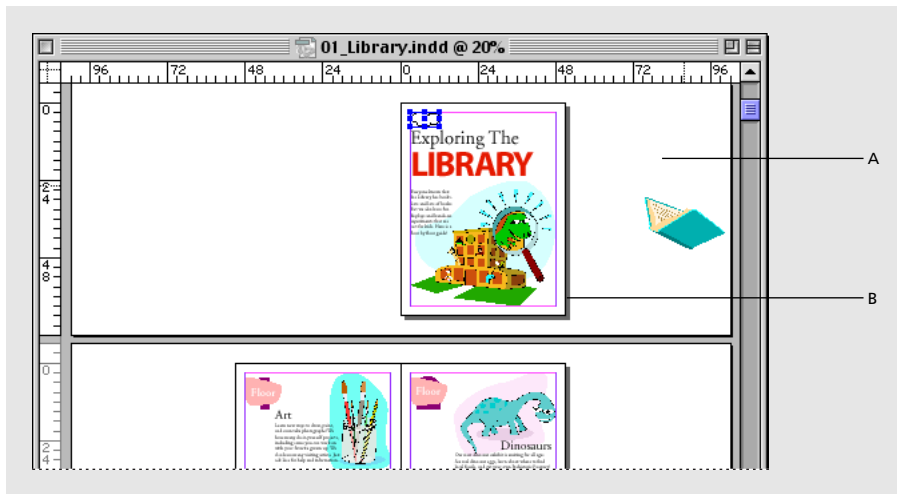
4 Close the 01\_Library.indd:2 document window, choose Window > Cascade, and then resize and reposition the window as necessary to return it to its original size. (Drag the title bar to move the window; drag the lower right corner to resize the window.)



## Pasteboard


Each page or spread in your document has its own pasteboard surrounding it, where you can store objects before positioning them. Pasteboards also provide the additional space along each edge of the document for extending objects past the edge of the page (also known as creating a bleed).

- 1 To see the full size of the pasteboard for the pages in this document, choose View > Entire Pasteboard.



A. Pasteboard B. Document

Notice the book graphic on the pasteboard for page 1. This graphic was originally placed in the document, but then moved to the pasteboard in anticipation that it would be used somewhere else in the document. It is no longer necessary to keep this image with the document.

- 2 Using the selection tool () , select the book image on the pasteboard and press Delete.
- 3 Choose View > Fit Page in Window to restore the window to its previous size.
- 4 Choose File > Save.

## Palettes

Palettes provide quick access to commonly used tools and features in InDesign. By default, palettes appear in stacked groups, which you can reorganize in various ways. Here you'll experiment with hiding, closing, and opening palettes.

1 Press Tab to hide all open palettes and the toolbox. Press Tab again to display them all again.

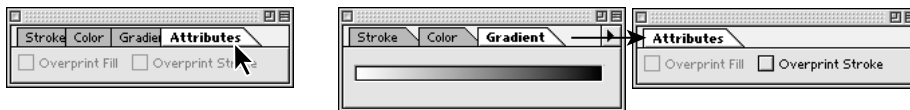
**Note:** You can hide or display just the palettes (not the toolbox) by pressing Shift+Tab.

2 Choose Window > Stroke to open the Stroke palette group. Click the Attributes tab in the Stroke palette group to make the Attributes palette appear at the front of the group.



Now you'll reorganize a palette group.

3 From the Stroke palette group, drag the Attribute palette's tab outside of the group to create a new group.



Palettes are grouped (left). Drag the palette tab to separate a palette from the group (right).

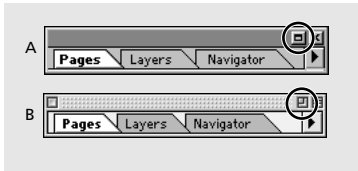
4 Now drag the Attribute palette's tab into the center of the Pages palette group. Then drag the tab back to the Stroke palette group. You can combine any palette with any palette group or create your own palette group consisting of the palettes you use most.

**Note:** To add a palette to a group, make sure you drag its tab into the middle of the palette. If you drag a palette tab to the bottom of another palette, you will dock the palette instead of adding it. See "Docking Palettes" on page 50.

5 Close the Stroke palette group.

Now you'll organize the palettes to create more space in your work area.

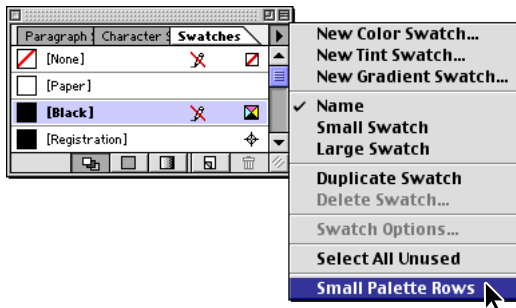
- 6 Drag the lower right corner of the Pages palette to change the height of the palette. Then click the minimize/maximize box (Windows) or the resize box (Mac OS) to collapse the group to the palette titles only. Click the box again to expand the group.



*Click to collapse or expand palette in Windows (A) or Mac OS (B).*

Some palettes, such as the Swatches palette, have a triangle in the upper right corner, from which you can access a menu containing additional commands and features.

- 7 From the Paragraph Styles palette group, click the Swatches palette tab move it to the front of the group. (You can also choose Window > Swatches to display the palette.)
- 8 Position the pointer on the triangle in the upper right corner of the Swatches palette, and hold down the mouse button to display the palette menu.



- 9 Choose Small Palette Rows. This command affects the Swatches palette rows, but not the other palette rows in the group. The commands in the palette menu apply only to the active palette.

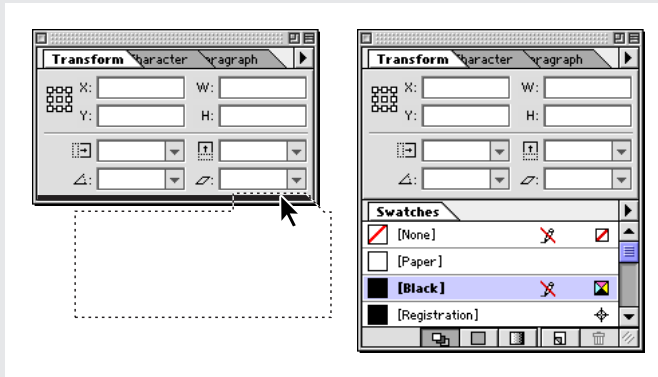
**10** From the Swatches palette menu, choose Small Palette Rows to return the palette rows to their original height.

### **Docking Palettes**

*You can dock palettes by connecting the bottom edge of one palette to the top edge of another palette, so that both palettes move together and are shown and hidden together. When you dock palettes, both palettes remain fully visible. In contrast, when you group palettes, only the frontmost palette is visible.*

*You can dock a single palette to one other palette or to a group of palettes. However, you can't dock a group of palettes unless you dock each of them individually, because docking involves dragging an individual palette's tab and not the title bar.*

*To move a set of docked palettes, drag its title bar.*



*To dock palettes, drag a palette's tab to the bottom edge of another palette. When the bottom edge of the other palette is highlighted, release the mouse.*

—From the Adobe InDesign 1.5 User Guide Supplement, Chapter 1

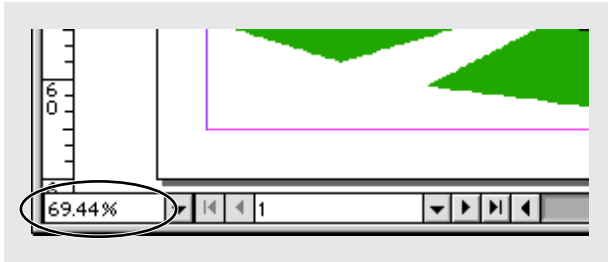
## **Changing the magnification of your document**

You can reduce or enlarge the view of the document to any magnification level from 5% to 4000%. InDesign displays the percentage of the document's actual size in the title bar, next to the filename, and at the lower left corner of the document window.

## Using the view commands and magnification menu

You can easily enlarge or reduce the view of a document by doing one of the following:

- Choose a percentage from the magnification menu at the lower left corner of the document window to enlarge or reduce the display by any preset increment.



- Type a percentage in the magnification menu.
- Choose View > Zoom In to enlarge the display by one preset increment.
- Choose View > Zoom Out to reduce the display by one preset increment.

**Note:** Preset sizes are those listed in the magnification menu.

- Choose View > Actual Size to display the document at 100%. (Depending on the dimensions of your document and your screen resolution, you may or may not see the entire document on-screen.)
- Choose View > Fit Page in Window to display the targeted page in the window.
- Choose View > Fit Spread in Window to display the targeted spread in the window.

## Using the zoom tool

In addition to the view commands, you can use the zoom tool to magnify and reduce the view of a document.

- 1 Select the zoom tool (🔍) in the toolbox and position it over the dinosaur on page 1. Notice that a plus sign appears at the center of the zoom tool (⊕).
- 2 Click once. The view changes to the next preset magnification.
- 3 Click again over the dinosaur on page 1. The view of the area you clicked is magnified again. Notice that the page is centered on the point where you clicked. Now you'll reduce the view.
- 4 Position the zoom tool pointer over the dinosaur and hold down Alt (Windows) or Option (Mac OS). A minus sign appears at the center of the zoom tool (⊖).
- 5 With Alt/Option still held down, click twice over the dinosaur; the view is reduced.

In addition to clicking the zoom tools, you can drag a marquee to magnify a specific area of your document.

- 6 With the zoom tool still selected, hold down the mouse button and drag a marquee around the dinosaur; then release the mouse.

The percentage by which the area is magnified depends on the size of the marquee (the smaller the marquee, the larger the level of magnification).



*Dragging a marquee with the zoom tool (left) and the resulting view (right)*

7 Double-click the zoom tool in the toolbox to return to a 100% view.

Because the zoom tool is used frequently during the editing process to enlarge and reduce the view of your document, you can temporarily select it from the keyboard at any time without deselecting any other tool you may be using. You'll do that now.

8 Click the selection tool in the toolbox and position it in the document window.

9 Hold down Ctrl+spacebar (Windows) or Command+spacebar (Mac OS). The selection tool icon becomes the zoom tool icon.

10 Click on the dinosaur to magnify the view, and release the keys. The pointer returns to the selection tool icon.

11 Hold down Ctrl+Alt+spacebar (Windows) or Command+Option+spacebar (Mac OS) and click to zoom out, returning to a 100% view.

12 Choose View > Fit Spread in Window to center the page.

## Navigating through your document

InDesign provides several options for viewing and navigating through a document, including the Pages and Navigator palettes, and the scroll bars.

### Turning pages

You can turn pages using the Pages palette, the page buttons at the bottom of the document window, the scroll bars, or a variety of commands.

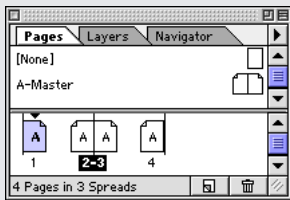
The Pages palette provides page icons for all the pages in your document. Double-clicking on any page icon or page numbers brings that page or spread into view. Double-clicking the numbers below the page icons centers a spread in the document window; double-clicking one page icon for a spread centers that page in the document window.

1 Make sure the selection tool () is still selected.

### Targeting and selecting spreads using the Pages palette

You can target or select spreads, depending on the task at hand:

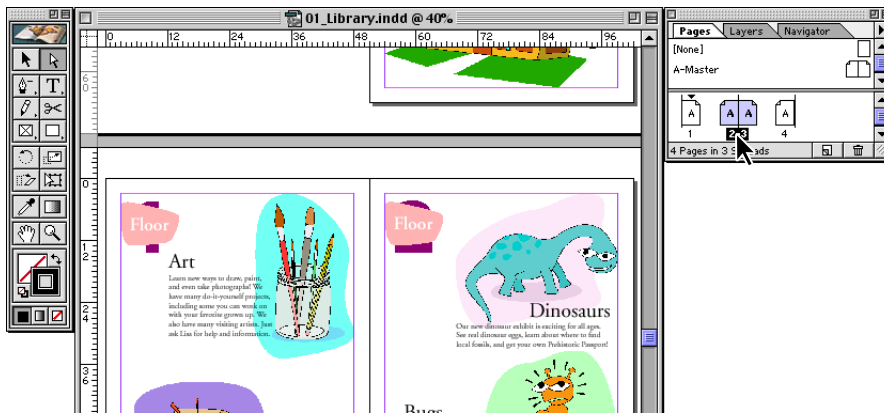
- Target a spread where the next new object should appear. For example, this is helpful when several spreads are visible in the document window and you want to paste an object on a specific spread. Only one spread can be the target at any time. By default, the target spread currently occupies the center of the document window. The target spread is indicated by the highlighted page numbers (not highlighted page icons) in the Pages palette and by a vertical ruler that is not dimmed.
- Select a page or spread when your next action will affect a page or spread rather than objects, such as setting margin and column options for a specific page only. When all pages of a spread are highlighted in the Pages palette, that spread is selected. You can select multiple spreads in a document. The selected spread is indicated by the highlighted page icons (not highlighted page numbers) in the Pages palette.



Page 1 selected; pages 2 and 3 targeted.

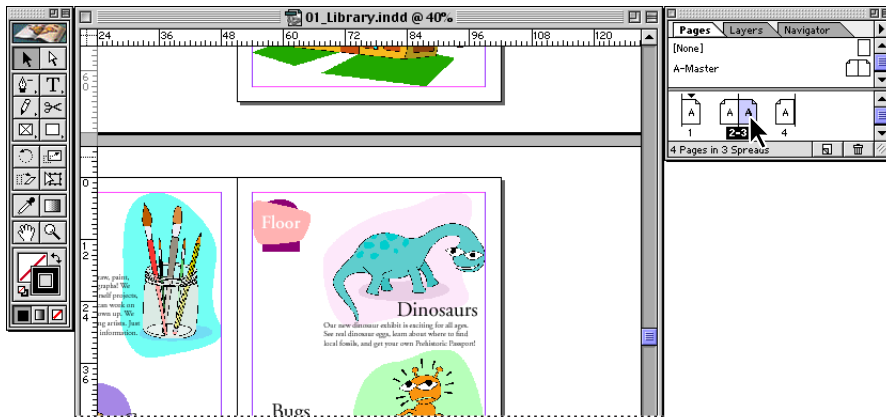
—From the *Adobe InDesign User Guide*, Chapter 3

2 In the Pages palette, double-click the 2–3 page numbers below the page icons to target and view the spread on pages 2 and 3 (you may need to scroll in the Pages palette). The spread opens and appears centered in the document window.



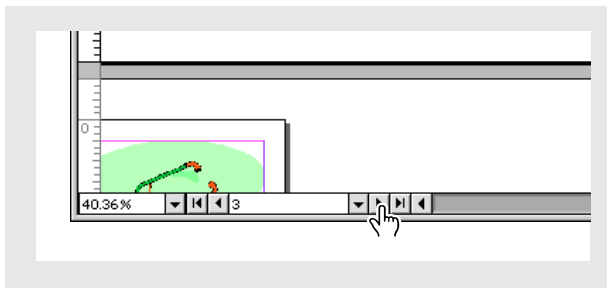


3 Double-click the page 3 icon to select and center only that page in the document window.



Now you'll use the page buttons at the bottom of the document window to change pages.

4 Click the next-page button (▶) at the lower left corner of the document window to go to page 4.



You can also turn to a specific page number by typing the number in the page box.

5 Select 4 in the page box at the lower left of the document window, type 1, and press Enter or Return.

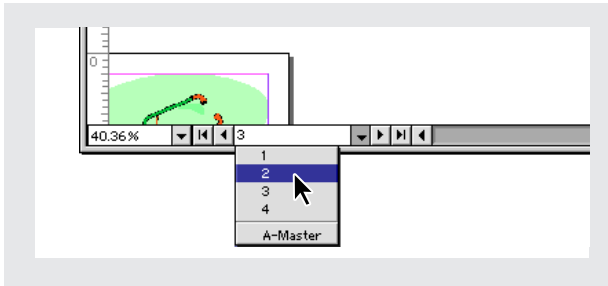
Now you'll change pages using a menu command.

6 Choose Layout > Go Back to return to page 4.

7 Choose Layout > Previous Page to turn to page 3.

You can also turn to a specific page number by selecting the page number from the Page pop-up menu.

8 Click the downward facing arrow (▼) to the right of the page box, and select 2 from the Page pop-up menu that appears.



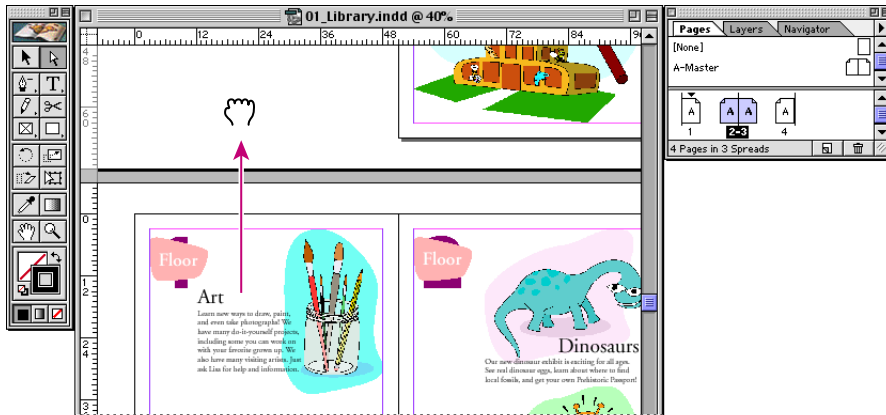
You can experiment with all the different methods. For a full list of commands used for turning pages, see “Turning pages” in Chapter 2 of the *Adobe InDesign User Guide*.

## Scrolling through a document

You can also use the hand tool and the scrollbars along the side of the document window to move to different areas or pages of a document. Here you’ll use both methods to navigate through the document.

- 1 Drag the scrollbar along the right side of the document window all the way to the top to view page 1.
- 2 With the selection tool (⌘) selected in the toolbox and the pointer positioned over the document, hold down the spacebar on the keyboard. Notice that the selection tool icon changes to the hand tool (⌘). You can use this shortcut when you don’t want to change tools while moving through the document. You can also simply select the hand tool (⌘) in the toolbox.

- 3 With the spacebar still held down, drag upward in the document window until the page 2–3 spread appears on-screen. As you drag, the document moves with the hand.



You can also use the hand tool as a shortcut to fit the page or spread in the window.

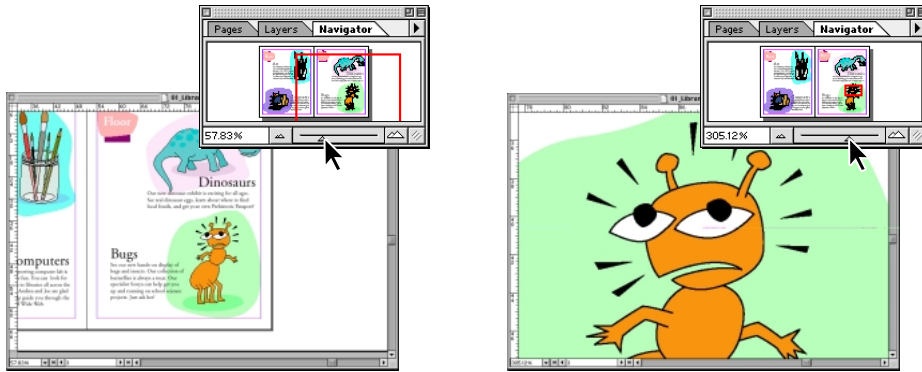
- 4 Double-click the hand tool in the toolbox to fit the spread in the window.
- 5 Using the hand tool, click on or near the bug in the lower right corner and drag to center it in the window.

## Using the Navigator palette

The Navigator palette provides several navigation and view tools in one location so you can quickly and easily magnify and scroll to a desired location.

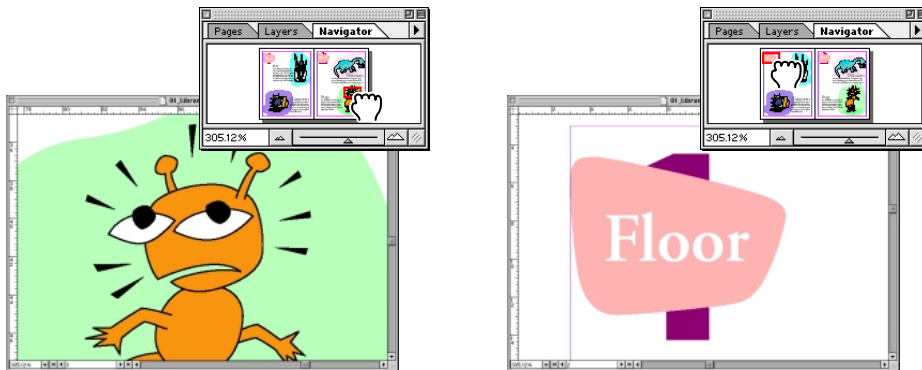
- 1 Click the Navigator palette tab (or choose Window > Navigator) to make sure it is at the front of the palette group.

2 In the Navigator palette, drag the slider to the right to magnify the view. As you drag the slider to increase the level of magnification, the red outline in the Navigator window decreases in size, showing you the area of view.



*Increasing the magnification using the Navigator palette*

- 3 In the Navigator palette, position the pointer inside the red outline. The pointer becomes a hand, which you can use to scroll to different areas of the page or spread.
- 4 Drag the hand to scroll to the upper left corner of page 2.
- 5 Save the file.



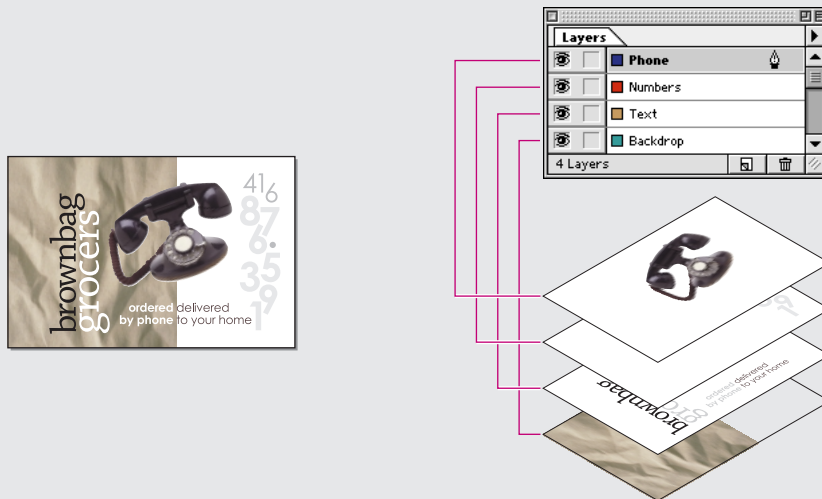
*Scrolling to a different area using the Navigator palette*

## Working with layers

By default, a new document contains just one layer (named Layer 1). You can rename the layer and add more layers at any time as you create your document. Placing objects on different layers lets you organize them for easy selection and editing. Using the Layers palette, you can select, display, edit, and print different layers individually, in groups, or all together.

### What are layers?

*Think of layers as sheets of transparent film that are stacked on top of each other. Where objects don't exist on a layer, you can see through the layer to objects on the layers behind it. By using layers, you can create and edit objects on one layer without affecting—or being affected by—objects on other layers.*



—From the *Adobe InDesign User Guide*, Chapter 3

● For a color version of document layers, see figure 1-1 in the color section.

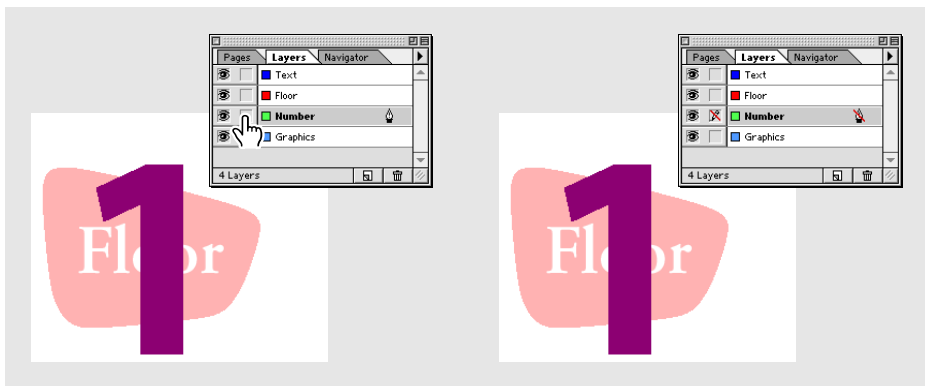
The 01\_Library.indd document has three layers. You'll experiment with these layers to learn how the order of the layers and the placement of objects on layers can greatly affect the design of your document.

- 1 Click the Layers palette tab in the Pages palette group, or choose Window > Layers.

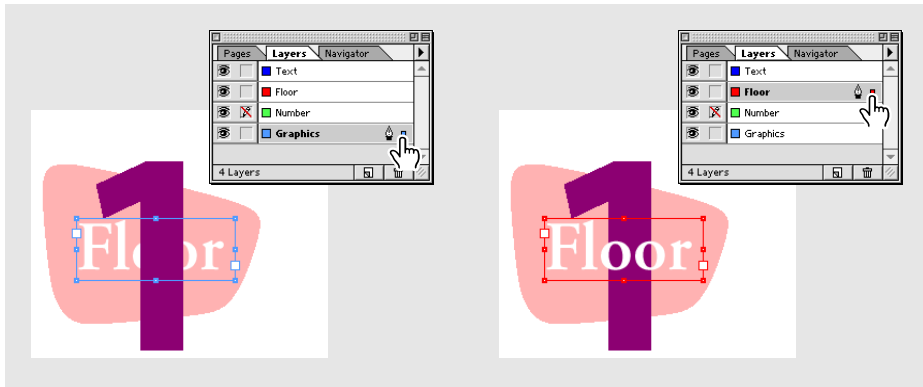
- 2 In the Layers palette, click the Number layer. Notice that a pen icon (✎) appears to the right of the layer name. This icon indicates that this layer is the target layer and anything you import or create will belong to this layer. The highlight indicates that the layer is selected.
- 3 In the Layers palette, drag the Number layer between the Floor layer and the Graphics layer; when you see a black line, release the mouse. Notice how the objects now appear in a different order in your document.



- 4 Click the empty square to the left of the Number layer name. This square lets you lock a layer so it cannot be edited. When you lock a layer, the palette displays a crossed-out pencil icon in the square.



- 5 Using the selection tool (⌘), click the word “Floor” in the document window. Notice in the Layers palette that the Graphics layer is selected and a dot appears to the right of the layer name. This indicates that the selected object belongs to this layer. You can move objects from layer to layer by dragging the dot.
- 6 In the Layers palette, drag the dot from the Graphics layer to the Floor layer. The word “Floor” now belongs to the Floor layer and appears in the stacking order in the document accordingly.



- For a color version of moving an object to another layer, see figure 1-2 in the color section.
- 7 Now that you’re done editing the layers, you can click the crossed-out pencil icon for the Number layer to unlock this layer.
- 8 Save the file.

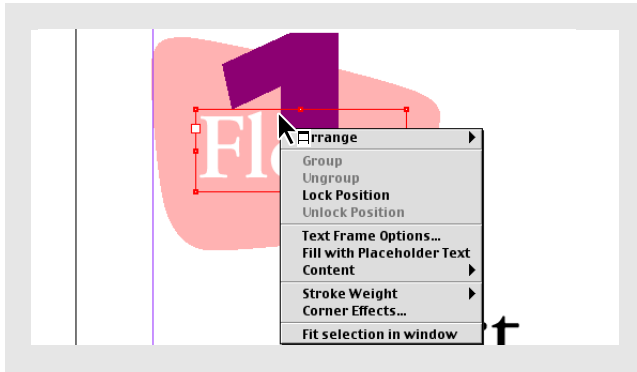
## Using context menus

In addition to the menus at the top of your screen, you can use context-sensitive menus to display commands relevant to the active tool or selection.

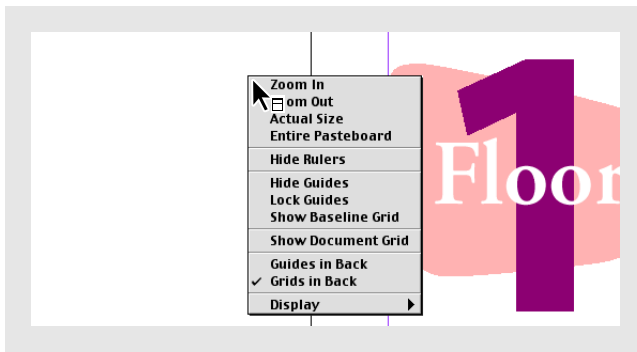
To display context-sensitive menus, position the pointer over an object or anywhere in the document window, and click with the right mouse button (Windows) or press Control and hold down the mouse button (Mac OS).

- 1 Make sure the word “Floor” is still selected.

2 With the selection tool (⌘), right-click (Windows) or Control-click (Mac OS) the word. Options for the text under the tool are displayed in the context-sensitive menu. (These same options are in the Object menu.)



3 Now click in the pasteboard, and then right-click (Windows) or Control-click (Mac OS) the pasteboard. Notice the context menu items change according to what is directly behind the tool.



## Using online Help

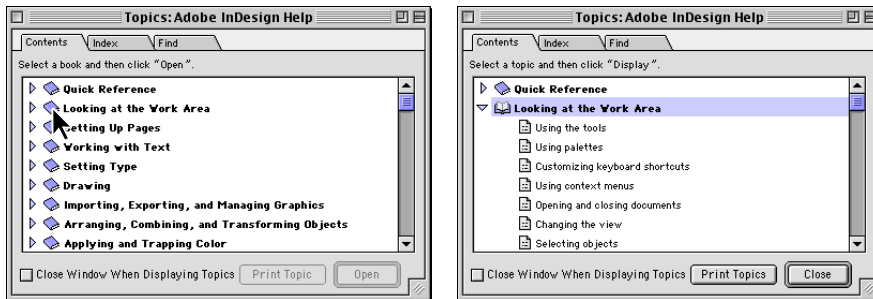
You can use online Help to find all of the information from the *Adobe InDesign User Guide*, plus keyboard shortcuts and additional information.

First you'll look for a topic using the online Help Contents screen.

1 Choose Help > Help Topics.



- 2 If necessary, click the Contents tab at the upper left of the Help screen to see a list of topics.
- 3 Drag the scroll bar or click the arrows to navigate through the contents. The contents are organized in a hierarchy of topics, much like the chapters of a book. Each book icon represents a chapter of information in Help.

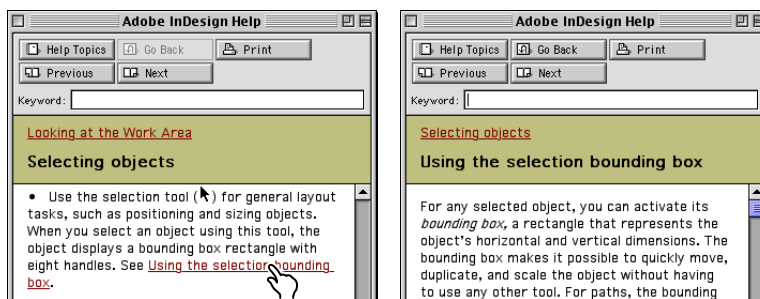


Book icons representing chapters (left); topics and subtopics (right)

- 4 To display the contents of Looking at the Work Area, double-click that book icon.
- 5 Locate the “Selecting objects” topic, and double-click to display it. A description of the topic appears along with a color illustration. All illustrations in the user guide appear in color in online Help.

You can click any red underlined text, called a *link*, to jump to another topic. The pointing finger icon (☞) indicates links and appears when you move the pointer over a link or a hotspot.

- 6 Position the pointer over the red text “Using the selection bounding box,” and click. That topic appears.



Clicking on a link (left) opens a new topic (right).

7 At the top of the Help window, click >> (Windows) or Next (Mac OS) to display the next topic.

8 To return to the Contents menu, do one of the following:

- In Windows, click Help Topics.
- In Mac OS, close the active Help window.

9 Click (Mac OS) or double-click (Windows) the Looking at the Work Area book icon to collapse the topic.

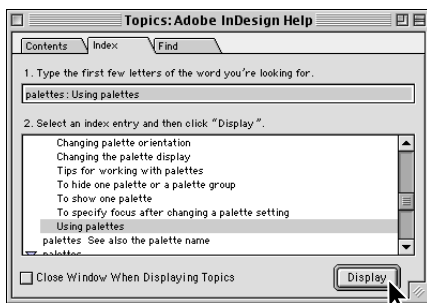
## Using keywords, links, and the index

If you can't find the topic you are interested in by scanning the Contents page, then you can try searching using links, the index, or a keyword.

1 In the Help Topics window, click the Index tab to display index entries. These entries appear alphabetically by topic and subtopic, like the index of a book.

2 In the Index window, type the term **palettes** in the text box under the instructions for step 1. Then find the subentry “using” (Windows) or “Using palettes” (Mac OS) and select it. The subentries are indexed differently for each platform, but the contents are identical.

3 Click Display to display the entry.



4 Click the Help Topics button at the top of the window to return to the main Help window.

Now you'll search using the Find option. This option creates a list of all the words in the Help system and lets you search by those words rather than just by the words included in topic headings. Here you'll search for text relating to the word “hybrid.”

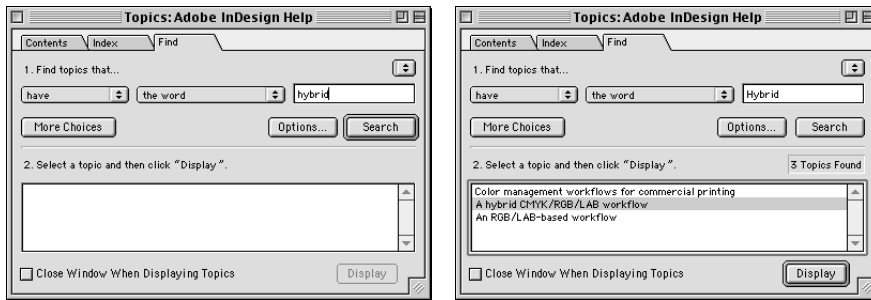
5 Click the Find tab.

6 In Windows, in the Find Setup Wizard dialog box, click Next. Then click Finish.

Windows creates a list of words in your InDesign Help files. It is only necessary to create this list the first time you use InDesign Help.

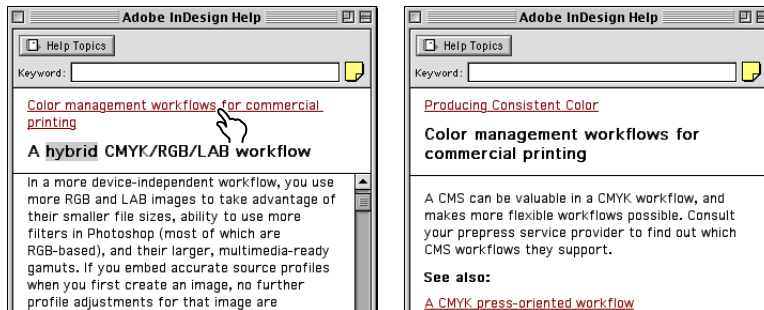
7 In Windows and Mac OS, type the word **hybrid** in the empty text box under step 1. Notice that you can refine your search by selecting matching words under step 2 (Windows) or by choosing an option from the pop-up menus to the left of the step 1 text box (Mac OS).

8 In Mac OS, click Search.



9 In Windows and Mac OS, select “A hybrid CMYK/RGB/LAB workflow” in the list that appears, and then click Display. (You can also double-click the entry to display it.)

10 When you have finished with that topic, you can click the link at the top of the Help window to view more links associated with the topic.



11 When you have finished, close all remaining Help windows.

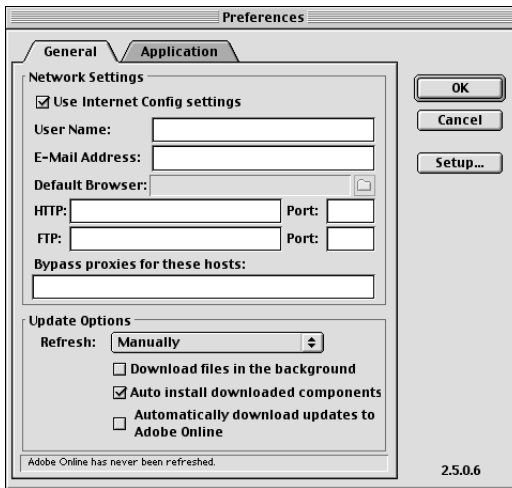
## Using Adobe online services

Another way to get information on Adobe InDesign or on related Adobe products is to use Adobe online services. If you have an Internet connection and a Web browser installed on your system, you can access the Adobe Systems Web site ([www.adobe.com](http://www.adobe.com)). Now you'll take a look at what Adobe Online has to offer:

- 1 Choose Help > Adobe Online, or click the icon at the top of the toolbox.



- 2 In the Adobe Online window, click Preferences.



- 3 Click Setup and follow the prompts to set your Internet connection preferences correctly. See the ReadMe file in your Adobe InDesign folder for more details on setting up your Internet connection.

- 4 Click OK to accept the preferences and return to the Adobe Online window.



- 5 Click Refresh. If a message appears asking if you want to update Adobe Online components, click Yes.

A progress bar indicates that the Adobe Online components are being updated.

- 6 The splash screen for Adobe InDesign online services appears, with buttons linking to topics on the Adobe Web site and links to related sites.



- 7 Click a topic button to go to the corresponding Adobe Web site.

Using Adobe Online, you can easily find information about InDesign—including tips and techniques, and troubleshooting and technical information. You can also learn about other Adobe products and news.

8 When you have finished browsing the Adobe site, exit from the browser, and then click the Close button in the Adobe Online window.

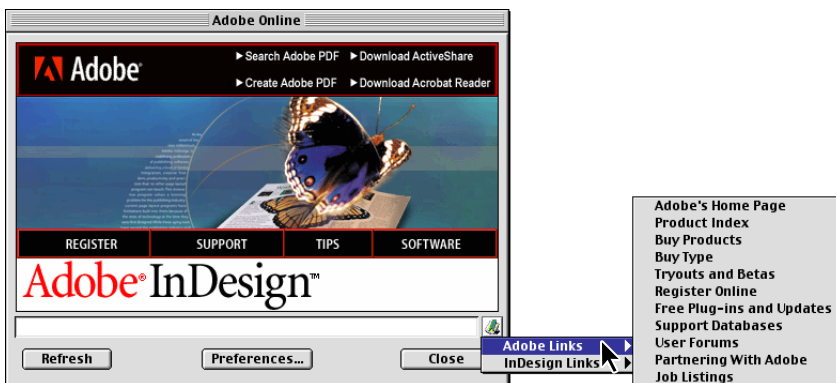
You’ve explored the most common aspects of the InDesign work area and should now be able to use the tools and palettes, navigate through your document, and find the help you need to use Adobe InDesign.

9 Save the file, and then close the document window.

## On your own

Now that you have explored the work area, try some of the following tasks using either the Library\_01.indd document or your own.

- 1 Display the document in four tiled document windows.
- 2 Using the Navigator palette, display all the pages of the document simultaneously in the document window.
- 3 Find information on layers using each of the different search options in online Help: Contents, Index, Keywords (Mac OS only), and Find.
- 4 Open the links in the Adobe Online window and explore the information available.



## Review questions

- 1 Describe two ways to change your view of a document.
- 2 How do you select tools in InDesign?
- 3 Describe three ways to change the palette display.
- 4 Describe two ways to get more information about the InDesign program.

## Review answers

- 1 You can select commands from the View menu to zoom in or out of a document, or fit it to your screen; you can also use the zoom tools in the toolbox, and click or drag over a document to enlarge or reduce the view. In addition, you can use keyboard shortcuts to magnify or reduce the display. You can also use the Navigator palette to scroll through a document or change its magnification without using the document window.
- 2 To select a tool, you can either click the tool in the toolbox or you can press the tool's keyboard shortcut. For example, you can press V to select the selection tool from the keyboard. You select hidden tools by clicking the triangle on a tool in the toolbox and dragging to select from the additional tools that appear.
- 3 To make the palette appear, you can click a palette's tab or choose a palette name from a menu, for example, Window > Align. You can drag a palette's tab to separate the palette from its group and create a new group, or drag the palette into another group. You can drag a palette group's title bar to move the entire group. Double-click a palette's tab to display palette titles only. You can also press Shift+Tab to hide or display all palettes.
- 4 Adobe InDesign contains online Help, with all the information in the Adobe InDesign User Guide, plus keyboard shortcuts and full-color illustrations. InDesign also has online services with links to the Adobe Systems Web site for additional information on services, products, and InDesign tips.