



Adobe® InDesign® CS4

The Professional Portfolio

AGAINST THE CLOCK
mastering graphic technology

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Acknowledgements

ABOUT AGAINST THE CLOCK

Against The Clock has been publishing graphic communications educational materials for more than 17 years, starting out as a Tampa, Florida-based systems integration firm whose primary focus was on skills development in high-volume, demanding commercial environments. Among the company's clients were LL Bean, The New England Journal of Medicine, the Smithsonian, and many others. Over the years, Against The Clock has developed a solid and widely-respected approach to teaching people how to effectively utilize graphics applications while maintaining a disciplined approach to real-world problems.

Against The Clock has been recognized as one of the nation's leaders in courseware development. Having developed the *Against The Clock* and the *Essentials for Design* series with Prentice Hall/Pearson Education, the firm works closely with all major software developers to ensure timely release of educational products aimed at new version releases.

ABOUT THE AUTHORS

Erika Kendra holds a BA in History and a BA in English Literature from the University of Pittsburgh. She began her career in the graphic communications industry as an editor at Graphic Arts Technical Foundation before moving to Los Angeles in 2000. Erika is the author or co-author of more than fifteen books about graphic design software, including QuarkXPress, Adobe Photoshop, Adobe InDesign, and Adobe PageMaker. She has also written several books about graphic design concepts such as color reproduction and preflighting, and dozens of articles for online and print journals in the graphics industry. Working with Against The Clock for more than seven years, Erika was a key partner in developing the new Portfolio Series of software training books.

Gary Poysick, co-owner of Against The Clock, is a well-known and often controversial speaker, writer, and industry consultant who has been involved in professional graphics and communications for more than twenty years. He wrote the highly popular *Workflow Reengineering* (Adobe Press), *Teams and the Graphic Arts Service Provider* (Prentice Hall), *Creative Techniques: Adobe Illustrator*, and *Creative Techniques: Adobe Photoshop* (Hayden Books), and was the author or co-author of many application-specific training books from Against The Clock.

CONTRIBUTING AUTHORS, ARTISTS, AND EDITORS

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- **Doris Anton**, Wichita State University
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Walk-Through

Project 3

HeartSmart Newsletter

Your client is a non-profit foundation that focuses on health education and public awareness. It publishes a monthly newsletter for people on various mailing lists, which are purchased from a list-management vendor. The client wants to change the existing newsletter template, and you want to take over the layout once the template has been revised.

This project incorporates the following skills:

- Opening and modifying an existing layout template
- Managing missing files and link requests
- Replacing graphics files to meet specific color output needs
- Formatting text with template style sheets
- Controlling text-frame insets, alignment, and wrap attributes
- Creating a table with data from a Microsoft Excel worksheet
- Preflighting the final layout and creating a job package

Project Goals

Each project begins with a clear description of the overall concepts that are explained in the project; these goals closely match the different “stages” of the project workflow.

Project Meeting

client comments

The poster to promote this festival is basically the “play bill,” and we will plaster it all over the city. We want the poster to be very attractive, colorful, and vivid, so the main focus — and most of the poster real estate — should be on the graphics. But the text also has to be readable. I emailed the text I want you to place at the bottom of the poster this morning. Our posters for past years’ festivals have always been 11 x 17”, and we want to stick with that size. This year’s festival tag line is “Move Your Feet to the Beat.” I found an excellent illustration of a saxophone player that we’d like to use as the main image, and we hope you can make the tag line look like it’s coming out the end of the sax. I also found some nice beach images that might make good backgrounds, so we emailed those to you as well.

art director comments

We have all the pieces you need, based on what the client provided, so you can get started composing the layout. Most of this job is going to be composing multiple images and formatting text, but I want you to go beyond basic image placement. InDesign includes many tools for manipulating images; use some of those to make sure this poster consists of more than just plain pictures. You already know the page size, and according to the printer the poster needs a 1/4” bleed allowance just to be safe. The final poster should be saved as a PDF using the printer’s specs, which I’ll email to you.

project objectives

To complete this project, you will:

- Create a print layout using a master text frame
- Convert the content type of frames
- Create a custom gradient to add visual impact
- Create a custom frame using an image clipping path
- Apply visual effects to unify various graphic elements
- Thread the flow of text through multiple text frames
- Format text characters and paragraphs to effectively convey a message
- Place inline graphics to highlight important textual elements
- Create a PDF file for commercial output

The Project Meeting

Each project includes the client’s initial comments, which provide valuable information about the job. The Project Art Director, a vital part of any design workflow, also provides fundamental advice and production requirements.

Project Objectives

Each Project Meeting includes a summary of the specific skills required to complete the project.

Stage 1 Building a Folding Template

When working with folding (multi-panel) documents, many people mistakenly assume that the trim size of the job is the size it appears after folding. In fact, the trim size of a folded document is actually the size of the sheet before it’s folded. In this stage of the project, you learn how to properly set up multi-panel documents that fold in a variety of ways.

There are two basic principles to remember when dealing with documents that fold:

- Paper has thickness. The thicker the paper, the more allowance you need to plan for the fold.
- Folding machines are mechanical devices. They process large amounts of material and are accurate to about 0.0125 inch. Paper sometimes shifts as it flows through the machine’s paper path, just as it can in a laser printer or photocopier.

Facing vs. Non-Facing Pages

As a general rule, you should use facing pages any time the design will be read like a book — left to right, Page 2 printed on the back of Page 1 and facing Page 3, and so on. For facing-page layouts, the left page mirrors the right page of each spread. The side margins are entered to as “inside” (near the spine or binding) and “outside” (away from the binding) instead of “left” and “right.”

When you plan a nonstandard folding document, it’s also important to decide whether it should be created with or without facing pages. The fold marks on the front and back of a sheet should line up. This means that if one panel of a document is a different size than the others, the back side of the sheet must mirror the front. In the following illustration, a document has one fold — a smaller panel that folds over to cover half of the inside of the brochure. Fold marks on the two sides line up properly, mirror the inside of the brochure so that, when folded, the two sides line up properly.

Inside of Brochure

Outside of Brochure

Note: Layout pages can be viewed as individual pages, or they can be viewed as two or more pages at a time, which is useful to spread.

Note: Depending on the job you’re designing — including one-page sheets are printed on two sides of the sheet page — you might need to reset facing pages or non-facing pages.

Note: Some printer providers give their clients fields computers to use for building a layout. You should ask your service provider if the templates are available before you waste the staff offers resources without.

Project 4: Letterfold Catering

Real-World Workflow

Projects are broken into logical lessons or “stages” of the workflow. Brief introductions at the beginning of each stage provide vital foundational material required to complete the task.

EDIT MARGIN AND COLUMN GUIDES

Your client wants to make several changes to the layout, including fewer columns and incorporating color into various elements. These changes will occur from one issue to the next, so you should change the template instead of simply changing the elements in each individual issue.

- With **template_working.indd** open, and with the **A-Front Page** master layout visible in the document window, choose **Layout>Margins and Columns**.

Every layout has a default setup, which you define when you create the file. Master pages have their own margin and column settings that might or might not be different than the default document settings.

Changing the column guides has no effect on the text frame; you have to change the text frame independently.
- In the resulting **Margins and Columns** dialog box, change the **Columns** field to **3** and the **Gutter** field to **0.2 in.**, and then click **OK**.

Check the **Preview** box to review your choices before finalizing them.
- Using the **Selection tool**, **Control**-right-click the 4-column text frame and choose **Text Frame Options** from the contextual menu.

You can also access the **Text Frame Options** dialog box from the **Object** menu.

Test frame columns

Column guides

Step-By-Step Exercises

Every stage of the workflow is broken into multiple hands-on, step-by-step exercises.

Visual Explanations

Wherever possible, screen shots are annotated so students can quickly identify important information.

Understanding Master Pages

There are two kinds of pages in InDesign:

- Layout pages** are the pages on which you place text and images.
- Master pages** are the pages on which you place recurring information, such as running heads (information at the top of the page) and running footers (information at the bottom of the page).

Master pages are one of the most powerful features in professional page layout software. Think of a master page as a template for individual pages; anything on the master appears on the related layout page(s). Changing something on a master page(s) applies the same changes to the related layout pages (unless you already changed the attribute, such as the fill color, on the layout page).

Master pages are accessed and controlled in the top half of the Pages panel. Layout pages, in the lower half of the panel, show the master that corresponds to the master applied to that page. The Pages panel Options menu has a number of indispensable options for working with master pages:

- New Master** opens a dialog box where you can assign a custom profile a meaningful name, whether the master will be based on another master page, and the number of pages (from 1 to 10) to include in the master layout.
- Select Unused Masters** highlights all master pages not associated with at least one layout page and not used as the basis of another master page. This option can be applied if you want to clean up your layout and remove extraneous elements.
- Master Options** opens a dialog box with the same options you defined when you created a new master.
- Apply Master to Pages** allows you to apply a specific master to selected pages. You can also apply a specific master to a layout by dragging the master icon onto the layout page and then to another master page. This option is useful if you've built a layout on a layout page and want to convert that layout to a master. Instead of copying and pasting the page contents, you can simply activate the page and choose Save as Master.
- Load Master Pages** allow you to import entire master page elements from one InDesign file to another. Imported masters will also be imported into the current InDesign file.
- Hide/Show Master Items** toggles to master items on layout pages.
- Override All Master Page Items** and **Change Master** items to a specific page-by-page basis. You can also override objects by pressing Command/Ctrl on the object you want to override.
- Remove All Local Overrides** (not from the master item) to override the master page. This option toggles to **Reset Overrides** if you have a specific object layout page.
- Detach All Objects from Master** (not from the master item) to override the master page. This option toggles to **Detach Master** if you have a specific object layout page.
- Allow Master Overrides on** (not from the master item) to override the master page. You can protect specific objects from being overridden.

Project 3: The

InDesign Foundations

Additional functionality, related tools, and underlying graphic design concepts are included throughout the book.

- Click OK to rename the style and return to the document.
- With the original graphics frame still selected, click **Green Stroke Frame in the Object Style panel to apply the style to the frame.**

Even though the object style is based on the selected object, you still have to manually apply the new style to the object. It's easy to forget this step.

Note: If you double-clicked Object Style 1 to open the Object Style Options dialog box, you don't want to complete dialog step since the style will be applied to the selected object when you double-click.

- Options/Alt-Shift-click the graphics frame and drag down to create an exact clone of the object. Repeat this two more times to end up with four graphics frames, aligned vertically.
- Position the bottom frame to align with the bottom margin guide, and then use the **Align panel (Window>Object > Layouts>Align)** to distribute the vertical centers of the four frames.

Advice and Warnings

Where appropriate, sidebars provide shortcuts, warnings, or tips about the topic at hand.

Project Review

fill in the blank

- The _____ tool can be used to draw the direction and position of a gradient within a frame.
- The _____ menu command reveals characters such as paragraph returns and tabs.
- _____ is the space between specific pairs of letters. To change this value, you have to place the insertion point between two characters.
- _____ is the theoretical line on which the bottoms of letters rest.
- _____ compression graphic scale rather images is lessy data is thrown away to reduce

short answer

- Briefly explain how transparency is applied to objects in an InDesign page layout.
- Briefly define a clipping path; provide at least two examples of how they might be used.
- Briefly explain the difference between character formatting and paragraph formatting.

Project Review

After completing each project, students can complete these fill-in-the-blank and short-answer questions to test their understanding of the concepts in the project.

Portfolio Builder Project

Use what you learned in this project to complete the following freeform exercise. Carefully read the art director and client comments, then create your own design to meet the needs of the project. Use the space below to sketch ideas; when finished, write a brief explanation of your reasoning behind your final design.

art director comments

The former marketing director for the Miami Jazz Festival recently moved to California to be the director of the Laguna Beach Sawdust Festival. She was pleased with your work on the jazz festival project, and would like to hire you to create the advertising for next year's art festival event.

To complete this project, you should:

- Develop some compelling visual elements that will be the central focus of the ads.
- Create an ad that fits on a tabloid-size newspaper page (9 1/2 x 11 1/2" with no bleeds).
- Create a second version of the same ad to fit a standard magazine rim size (8 1/4 x 10 7/8" with 1/8" bleeds).

client comments

The Sawdust Festival is one of the longest running and well-known events in California, maybe even the entire United States. We're planning our advertising campaign for the 2010 summer. You might want to poke around our Web site to get some ideas. There's information about the festival's history, as well as images from previous shows. We need an ad that will be placed in the pull-out sections of regional newspapers, and another version of the same ad that can go into magazines for travel/tourism audiences like the WestWay magazine from AAA. Both ads should be four-color, although you should keep in mind the basic color scheme that we use on our Web site.

The ads need to have all the relevant information (we sent you the text, in the RF_BuildersSawdust folder). But just as important, we want the ad to be art in its own right; the visual element you create will actually be repurposed for festival souvenirs like the shirts, posters, and so on.

project justification

Portfolio Builder Projects

Each step-by-step project is accompanied by a freeform project, allowing students to practice skills and creativity, resulting in an extensive and diverse portfolio of work.

Visual Summary

Using an annotated version of the finished project, students can quickly identify the skills used to complete different aspects of the job.

Project Summary

Each combined form and function — presenting the client's information in a clear, easy-to-read while using large graphic elements to grab the viewer's attention and reinforce the message of relevant text is large enough to be visible but isn't the primary visual element. Instead, this poster required a number of different text formatting options, including moving paragraph controls and controlling the flow of text across multiple frames. You should understand the difference between character and paragraph formatting, and know where to find options when you need them.

Custom colors and gradients give you significant creative control over virtually every element in InDesign. Custom colors and gradients add visual interest to any piece, while more sophisticated tools like opacity and knockout allow you to experiment creatively within your design. You find exactly the look you want to communicate your intended message.

- Create and format text on a path
- Create custom swatches and gradients for blue ink and rocks
- Use the blending mode to blend an image into the forest background
- Use a gradient layer to add soft edges to a photo image
- Create a custom graphics frame from an InDesign-generated clipping path
- Flow graphics as anchored inline objects
- Use optical margin alignment to align paragraphs outside the text frame
- Control text flow across multiple text frames

Project 2: Festival Poster 143

Projects at a Glance

The *Against The Clock Portfolio Series* teaches graphic design software tools and techniques entirely within the framework of real-world projects; we introduce and explain skills where they would naturally fall into a real project workflow. For example, rather than offering an entire chapter about printing (which most students find boring), we teach printing where you naturally need to do so — when you complete a print-based project.

The project-based approach in the *Portfolio Series* allows you to get in depth with the software beginning in Project 1 — you don't have to read several chapters of introductory material before you can start creating finished artwork.

The project-based approach of the *Portfolio Series* also prevents “topic tedium” — in other words, we don't require you to read pages and pages of information about text (for example); instead, we explain text tools and options as part of larger projects (in this case, beginning with placing text on corporate identity pieces).

Clear, easy-to-read, step-by-step instructions walk you through every phase of each job, from creating a new file to saving the finished piece. Wherever logical, we also offer practical advice and tips about underlying concepts and graphic design practices that will benefit students as they enter the job market.

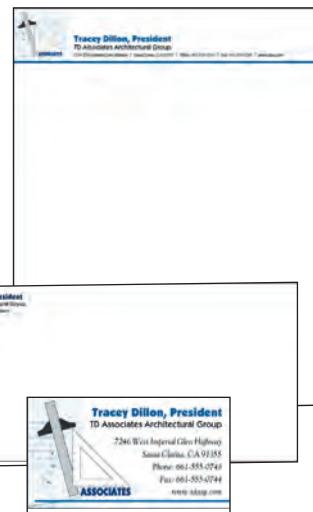
The projects in this book reflect a range of different types of InDesign jobs, from creating a corporate identity package to implementing a newsletter template to compiling a multi-chapter book. When you finish the eight projects in this book (and the accompanying Portfolio Builder exercises), you will have a substantial body of work that should impress any potential employer.

The eight InDesign CS4 projects are described briefly here; more detail is provided in the full table of contents (beginning on Page viii).

project 1

Identity Package

- Setting up the Workspace
- Drawing in InDesign
- Create and Format Basic Text
- Creating a Cohesive Layout
- Printing InDesign Files



project 2

Festival Poster

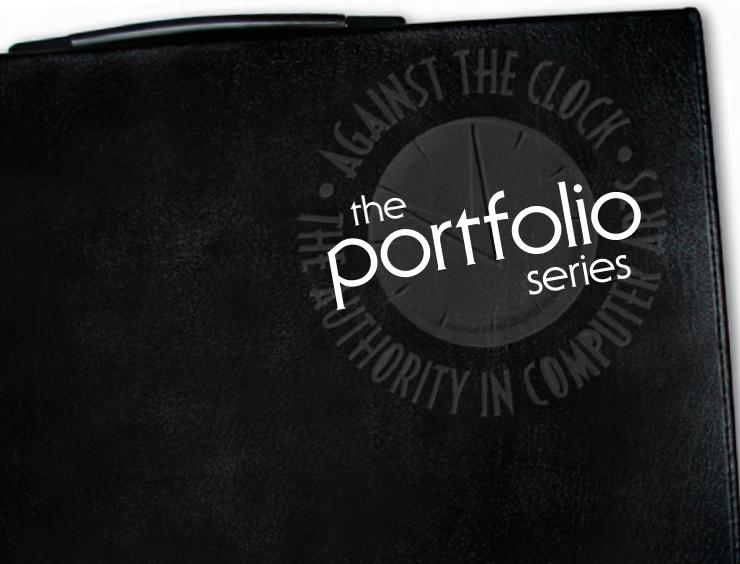
- Building Graphic Interest
- Importing and Formatting Text
- Graphics as Text and Text as Graphics
- Outputting the File



project 3

HeartSmart Newsletter

- Working with Templates
- Working with Style Sheets
- Working with Tables
- Preflighting and Packaging the Job



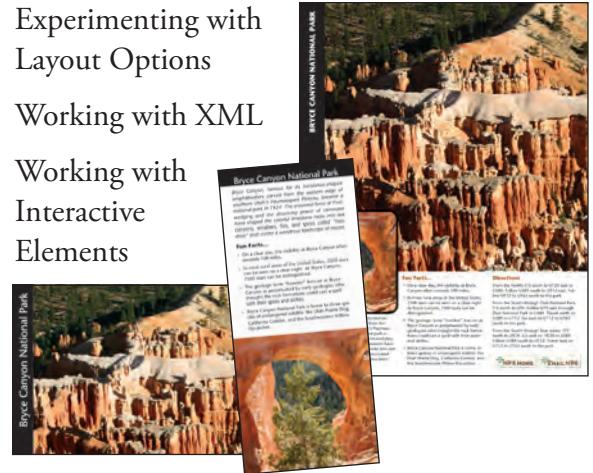
project 4 **Letterfold Catering Menu**

- ❑ Building a Folding Template
- ❑ Working with Imported Text
- ❑ Editing Advanced Frame Options



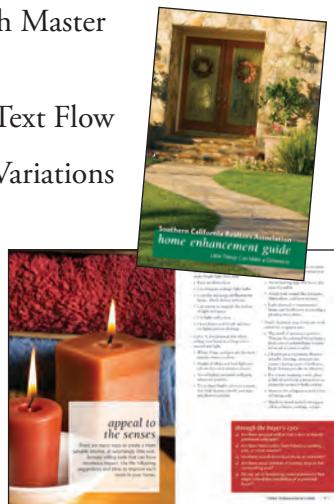
project 7 **National Parks Info Pieces**

- ❑ Experimenting with Layout Options
- ❑ Working with XML
- ❑ Working with Interactive Elements



project 5 **Realtor Collateral Booklet**

- ❑ Working with Master Pages
- ❑ Controlling Text Flow
- ❑ Outputting Variations of Files



project 8 **Multi-Chapter Booklet**

- ❑ Combining Documents into Books
- ❑ Building a Table of Contents
- ❑ Building an Index
- ❑ Exporting Book Files
- ❑ Merging Data into an InDesign Layout



project 6 **Versioned Brochure**

- ❑ Controlling Color for Output
- ❑ Placing and Controlling Images
- ❑ Controlling and Checking Text
- ❑ Creating Multiple Layers



Some experts claim most people use only a small fraction — maybe 10% — of their software’s capabilities; this is likely because many people don’t know what is available. As you complete the projects in this book, our goal is to familiarize you with the entire tool set so you can be more productive and more marketable in your career as a graphic designer.

It is important to keep in mind that InDesign is an extremely versatile and powerful application. The sheer volume of available tools, panels, and features can seem intimidating when you first look at the software interface. Most of these tools, however, are fairly simple to use with a bit of background information and a little practice.

Wherever necessary, we explain the underlying concepts and terms that are required for understanding the software. And we’re confident that these projects provide the practice you need to be able to create sophisticated artwork by the end of the very first project.

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Getting Started

PREREQUISITES

The entire Portfolio Series is based on the assumption that you have a basic understanding of how to use your computer. You should know how to use your mouse to point and click, as well as how to drag items around the screen. You should be able to resize and arrange windows on your desktop to maximize your available space. You should know how to access drop-down menus, and understand how check boxes and radio buttons work. It also doesn't hurt to have a good understanding of how your operating system organizes files and folders, and how to navigate your way around them. If you're familiar with these fundamental skills, then you know all that's necessary to use the Portfolio Series.

RESOURCE FILES

All of the files that you need to complete the projects in this book are on the provided Resource CD in the **RF_InDesign** folder. This folder contains nine subfolders, one for each project in the book (including the Interface); you will be directed to the appropriate folder whenever you need to access a specific file. Files required for the related Portfolio Builder exercises are in the **RF_Builders** folder.

The Resource CD also includes a **WIP** folder, which also contains (mostly empty) subfolders for each project in the book. This is where you will save your work as you complete the various projects. In some cases, the location of a file will be extremely important for later steps in a project to work properly; that's why we've provided a specific set of folders with known file names.

Before you begin working on the projects in this book, you should copy the entire WIP folder to your hard drive or some other recordable media such as a flash drive; when we tell you to save a file, you should save it to the appropriate folder on the drive where you put that WIP folder.

ATC FONTS

You must install the ATC fonts from the Resource CD to ensure that your exercises and projects will work as described in the book; these fonts are provided on the Resource CD in the **ATC Fonts** folder. Specific instructions for installing fonts are provided in the documentation that came with your computer. You should replace older (pre-2004) ATC fonts with the ones on your Resource CD.

SYSTEM REQUIREMENTS

As software technology continues to mature, the differences in functionality from one platform to another continue to diminish. The Portfolio Series was designed to work on both Macintosh or Windows computers; where differences exist from one platform to another, we include specific instructions relative to each platform.

One issue that remains different from Macintosh to Windows is the use of different modifier keys (Control, Shift, etc.) to accomplish the same task. When we present key commands, we always follow the same Macintosh/Windows format — Macintosh keys are listed first, then a slash, followed by the Windows key command.

Minimum System Requirements for Adobe InDesign CS4:

Windows

- 1.5GHz or faster processor
- Microsoft® Windows® XP with Service Pack 2 or Windows Vista® with Service Pack 1
- 512 MB of RAM (1 GB recommended)
- 1.8 GB of available hard-disk space for installation
- 1,024×768 display with 16-bit video card
- DVD-ROM drive
- QuickTime 7 required for multimedia features

Macintosh

- PowerPC® G5 or multicore Intel® processor
- Mac OS X v10.4.11–10.5.4
- 512 MB of RAM (1 GB recommended)
- 1.6 GB of available hard-disk space for installation
- 1,024×768 display with 16-bit video card
- DVD-ROM drive
- QuickTime 7.2 required for multimedia features