

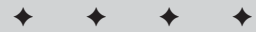
Creating Layout Standards

Think for a moment about the publications you produce. Chances are that most of your work involves creating multiple iterations of a basic set of publications, and each publication looks more or less the same from issue to issue. For example, periodicals such as newsletters, magazines, and newspapers don't change much from one issue to the next (disregarding the occasional redesigns that all publications undergo). The ongoing uniformity of such things as page size, margins, page layouts, text formats, even the tone of the writing, gives each publication a unique look and feel.

If you had to start from scratch every time you created a publication, you'd spend the bulk of your time setting up your documents and have little time left to attend to the appearance of the content (you'd probably get terribly bored, too). Few things are less rewarding than doing the same job over and over. Fortunately, InDesign includes several extremely useful features that let you automate repetitive tasks. This chapter focuses on three of them — master pages, templates, and libraries:

- ◆ A *master page* is a preconstructed page layout that you can use when adding pages to a multipage document. With master pages, you can design a single “background” page and then use it as the basis for as many document pages as you want. Without master pages, you would have to create every page from scratch.
- ◆ A *template* is a preconstructed document that's used to create multiple iterations of the same design or publication. A template is a shell of a document that contains everything in a publication — except content. Each time you need to create a new version of a repeatedly produced publication, you open its template, add the content (text and pictures), tweak as desired, and then print. Next issue, same thing.

CHAPTER 7



In This Chapter

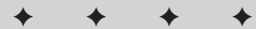
Automating repetitive tasks

Working with master pages

Creating templates

Using libraries

Working with other page-layout tools



- ♦ As its name suggests, a *library* is a place where you store things. Specifically, InDesign libraries are files for storing objects that you've created in InDesign and that you intend to use repeatedly in multiple documents.

When you combine master pages, templates, and libraries with the ability to create character and paragraph style sheets (covered in Chapter 20), you have a powerful set of automation tools. Style sheets automate text formatting; libraries automate object creation; master pages automate page construction; and templates automate document construction.

How and to what extent you use these features depends on your personal preferences and the publications you produce. You might think that something as small as a business card wouldn't benefit from any of these features, but if it's a business card for a corporate employee, the chances are that, other than the personal information, it's exactly the same as business cards of every other employee. By creating and saving a business-card template, you could quickly build cards for several or several hundred new employees. All you have to do is open the template; add the name, title, and phone number of the new employee; and then print.

For other publications, you might use several — perhaps all — of the aforementioned timesaving features. A good newsletter template, for example, would contain a set of style sheets for formatting text, probably a master spread or two (depending on whether all pages shared exactly the same design), and perhaps an associated library of frequently used objects — house ads, corporate logos, boilerplate text, and so on.

**Tip**

Although this chapter begins with master pages, this doesn't mean that you should begin work on a publication by creating master pages. You may prefer to work on text formatting tasks first and build style sheets before turning your attention to page-layout and document-construction tasks. One of the best things about InDesign is that it lets you perform tasks in whatever order makes most sense to you. Over time, you'll develop a personal *modus operandi* for creating publications. Whatever style you develop, make sure that you make full use of style sheets, libraries, master pages, and templates.

**Note**

In this chapter, the terms *master page* and *master spread* are used interchangeably. If you're working on a facing-page document, you'll use facing-page masters that have both left- and right-hand pages. These are master spreads. For single-sided documents, a master page has only a single page.

Creating and Applying Master Pages

Before the arrival of personal computers, publications were created by graphic designers who leaned over light tables and — armed with matte knives and waxing

machines — stuck galleys of type, halftones, and plastic overlays onto paste-up boards. The paste-up boards were usually oversized sheets of white card paper on which was printed a grid of light blue lines. The blue guidelines indicated such things as the edge of the final, trimmed page, the margins in which text and pictures were placed, column boundaries, and so on. These guidelines helped the designer position elements on a page and also helped ensure consistent placement of repeating page elements, such as page numbers.

Although there are no paste-up boards in the electronic publishing world, the concept has survived in the form of *master pages*. A master page is a nonprinting page that you can use as the background (that is, as the starting point) for document pages. Typically, master pages contain text and graphic elements that appear on all pages of a publication, such as page numbers, headers, footers, folios, and so on. And like their paste-up board ancestors, master pages also include guidelines that indicate page edges, column boundaries, and margins, as well as other manually created guidelines to aid page designers in placing objects. By placing items on master pages, you save yourself the repetitive work of placing the same items one by one on each and every document page.

By default, every InDesign document you create contains a master page. Whether you use the master page or create and use additional master pages depends on the kind of publication you're creating. If it's a single-page document, such as a business card, or an advertisement, you don't need to worry about master pages at all. (Generally, master pages are of little use for one-page documents.) However, if you're creating a multipage document like a newsletter, a book, or a catalog, using master pages will save you time and help ensure design consistency. It's impossible to overstate the importance of master pages. They're one of InDesign's most powerful features.

The Pages pane

When you work on multipage documents, you'll probably want to display the Pages pane (Window ⇨ Pages or F12), shown in Figure 7-1. The Pages pane displays an icon-based view of document pages (bottom) and master pages (top) in the current document. The controls in the Pages pane and its accompanying pop-up menu let you perform several master page–related tasks, including creating and deleting master pages, applying master pages to document pages, and creating master pages out of document pages. The Pages pane also lets you add and remove document pages.



See Chapter 5 for more information about adding and removing document pages.

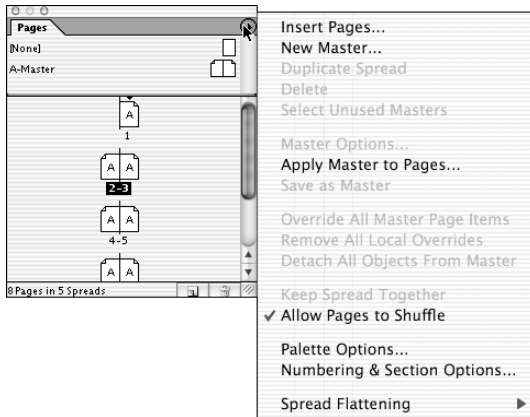


Figure 7-1: The Pages pane. The document page icons at the bottom of the pane show that the publication has eight pages. The master-page icons at the top show the default masters: None and A-Master.

Here's a quick rundown of the controls available in the Pages pane and the commands in its pop-up menu:

- ♦ The page icons at the top of the pane represent master pages. Every document includes a master page called [None], which includes only margin guidelines, and A-Master, which reflects the margin and column settings you specified in the New Document dialog box when you created the document. If a letter is displayed on a master page icon, it indicates that the master spread is based on another (parent) master page; for example, if you have a master page named C-Master and the icons for C-Master have the letter A, then C-Master is based on A-Master. A master page's name is displayed below its icon. If a master page and its name are highlighted, it means that master page is displayed in the document window. If a master page name is displayed in reverse type, it's currently displayed in the document window.
- ♦ The page icons at the bottom of the pane represent document pages. Dog-eared icons represent left and right pages in a facing-page document. The letter displayed on a page icon indicates the master page it's based on. (If no letter is displayed, the page is based on the blank master page.) The numbers below the page icons indicate the page numbers, including section numbering, if any (sections are covered in Chapter 5). If a page and its number are highlighted, it means that page is currently displayed in the document window. If a page number is displayed in reverse type (that is, white characters on a black background), it means that it's currently displayed in the document window.

- ◆ The Create New Page button (notepad icon) at the bottom of the pane lets you add a new page with a mouse click.
- ◆ The Delete Selected Pages button (trash can icon) lets you delete document and master pages.
- ◆ The Insert Pages palette menu command lets you add pages to a document and specify the master page on which they're based.
- ◆ The New Master palette menu command lets you add a new master page.
- ◆ The Duplicate Spread and Duplicate Page palette menu commands do exactly what the names say. They let you duplicate a page or a facing-page spread. The name of the command depends on whether a page or spread is highlighted in the pane.
- ◆ The Delete Page, Delete Spread, Delete Master Page, and Delete Master Spread palette menu commands let you delete single pages and facing-page spreads (both document pages and master pages). Again, the menu name will change based on what is selected in the pane.
- ◆ The Select Unused Masters palette menu command selects all unused master pages and spreads, so you can easily identify and perhaps delete them.
- ◆ The Master Options palette menu command is used for changing master-page attributes, including name and parent master page (if you want to base a master page on another master page).
- ◆ The Apply Master to Pages palette menu command is used for applying a master-page layout to one or more document pages.
- ◆ The Save As Master palette menu command lets you convert a document page into a master page.
- ◆ The Override All Master Page Items palette menu command lets you have any local changes to the selected pages override the master-page settings. This command moves all master items to the document page on the selected pages.



The Override All Master Pages function is new to InDesign CS.

- ◆ The Remove All Local Overrides and the Remove Selected Local Overrides palette menu commands returns master objects that you've modified on specific document pages to their original condition. If no object is selected, the menu command is Remove All Local Overrides; if one or more objects are selected, the menu command is Remove Selected Local Overrides.
- ◆ The Detach Selection from Master palette menu command removes any master page items that had been modified on the selected pages from the master page *for those selected document pages* only. Essentially, this command prevents you from using the Remove All Local Overrides or Remove Selected

Local Overrides commands for these document pages, permanently changing the master pages for them.

- ♦ The Keep Spread Together palette menu command ensures that the pages will not be split apart as you add pages. Normally, adding a single page shuffles all subsequent pages so they form new spreads. With this command, existing spreads are maintained, so adding an odd number of pages will not cause them to be reshuffled.
- ♦ The Palette Options palette menu command controls icon size, position, and other Pages pane display settings.
- ♦ The Numbering & Section Options palette menu command lets you establish independently numbered sections in a single document. For example, you could create a section if you wanted to use a different numbering scheme (Roman numerals, perhaps) for the front matter of a book than for the body. (See Chapter 5 for more information about sections.)
- ♦ The Spread Flattening palette menu command lets you control image flattening for specific spreads. *Flattening* is InDesign's term for reducing the resolution of graphics to save disk space and speed output time. Typically, you'd flatten images for Web-oriented documents, since the Web displays images at the relatively low resolution of 72 dpi. You might also flatten high-resolution graphics when printing a draft version, to speed up printing.



Chapter 31 covers flattening in more detail.

Creating a new master page

If all the pages in the publication you're creating share essentially the same page design, you don't need to create a new master page. Instead, you can simply use the default master page called A-Master that every document has. But if you intend to use more than one page layout in your document — maybe you're building a magazine and you want some pages to use a three-column format and others to use a two-column format — you'll need to create additional master pages.

Before you create a new master page, you should have a general idea of how you want it to look. In particular, you should know where you want to place margins, column boundaries, and repeating elements, such as page numbers. (Laying out master pages is covered later in this section.) When you're ready to create a new master page, here's what you do:

1. **If the Pages pane is not displayed, choose Windows ⇨ Pages or press F12.**
2. **From the Pages pane's palette menu, choose New Master.**

You can also press Option+⌘ or Ctrl+Alt and click the Create New Page button at the bottom of the pane. The New Master dialog box, shown in Figure 7-2, is displayed.

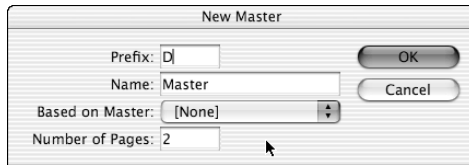


Figure 7-2: The New Master dialog box.

- 3. In the Prefix field, specify a one-character prefix that's attached to the front of the master page name and displayed on associated document page icons in the Pages pane.**

The default will be a letter, such as B, C, or D.

- 4. In the Name field, enter a name for the master page.**

Use something descriptive, like “3-column Layout,” “Front Matter Layout,” or “Chapter Title Pages.”

- 5. If you want to base the master page on another master page you've already created, choose the parent master page from the Based on Master pop-up menu.**

Basing a master page on another master page is covered in more detail later in this section.

- 6. In the Number of Pages field, enter the number of pages you want to include in the master spread.**

Typically, you'll enter **2** for a facing-page document and **1** for a single-page document.

- 7. After you've finished specifying the attributes of the new master page, click OK to close the dialog box.**

After you create a new master page, it's displayed in the document window. (When a master page is displayed, its name is displayed in the Page Number field in the bottom-left corner of the document window.) You can modify any of a master page's attributes at any time by clicking on its icon at the top of the Pages pane, choosing Master Options from the pane's palette menu, and then changing any of the settings in the Master Options dialog box, which is identical to the New Master dialog box.

Basing a master page on another master page

If you find that a particular publication requires more than one master page, you may want to first lay out a base master page (you could use the default A-Master) and then create additional master pages that share the same basic layout but are slightly different. For example, if the magazine you're working on uses two-, three-, and four-column page layouts, you could create the two-column master spread first and include all repeating page elements. You could then create two additional

master page spreads, base them on the two-column master, and specify different column formats. The two “children” masters would be identical to the parent except for the number of columns. If you subsequently decide to modify, move, or delete a repeating page element, such as the issue date in the folio, you could make the change on the parent master and it will automatically be applied to the children masters.

When you create a new master page, the New Master dialog box provides the option to base it on an existing master page. You can also choose or change a master spread’s parent by:

- ♦ Choosing Master Options in the Pages pane’s palette menu and then choosing a master page from the Based on Master pop-up menu.
- ♦ Dragging and dropping the icon of a master spread (the parent) onto the icon of another master spread (the child). Be careful if you use this method. It’s possible to base only one page of a master spread on another, but in most cases you’ll want to base both pages of the child master on both pages of the parent master. To do so, make sure that when you release the mouse button both pages of the child are highlighted.
- ♦ Clicking on the master spread you want to be the child, then pressing Option or Alt and clicking on the master spread you want to be the parent.

When you base a master page on another master page, the prefix of the parent is displayed on the page icon of the child.



Tip

If you base a master spread on another master spread, you can still modify the master objects (that is, the objects inherited from the parent master) on the child master page. As with regular document pages, you have to Shift+⌘+click or Ctrl+Shift+click on the object inherited from a parent master to release it before you can edit it on a child master.



QuarkXPress cannot base a master page on another, so InDesign users who are used to QuarkXPress may ignore this feature. But they shouldn’t—it has the same power that based-on formatting provides style sheets in QuarkXPress and InDesign.

Creating a master spread from a document spread

Generally, if you need a new master spread, you’ll begin by choosing New Master from the Pages pane’s palette menu. But you can also create a master spread from a spread of document pages. To do so, highlight the spread of document pages by clicking on the page numbers below the page icons in the Pages pane, then choose Save as Master from the Pages pane’s palette menu. The new master is assigned a default name and prefix. If you want to modify any of its attributes, click on its name in the Pages pane, then choose Master Options from the pop-up menu.

Duplicating a master

You can create a copy of a master spread by clicking on its icon and then choosing Duplicate Master Spread from the Pages pane's palette menu or by clicking on its icon, dragging it onto the Create new page button, and releasing the mouse. If you duplicate a master spread, there is not a parent/child relationship between the original master and the copy (as there is when you base a master on another master).

Deleting a master

To delete a master page, click on its name and then choose Delete Master Page from the Pages pane's palette menu. You can also click on the master icon, then click the Trash icon in the Pages pane or drag the icon directly to the Trash.

Laying out a master page

Because a master page is similar to a document page, you can use the same approach for building both master and document pages. Some designers prefer to do a preliminary sketch on paper and then re-create the design in InDesign. You may like to do your creative brainstorming at your computer, in which case you can use InDesign as your sketchpad. The main difference between document pages and master pages is that master pages don't contain any content (other than elements that appear on every page). So, when you're building a master page, you should be thinking more about the page's overall infrastructure than about details.

Here are a few things to keep in mind when designing master pages:

- ♦ **If you're working on a facing-page document (most multipage publications have facing-pages), you'll create facing-page master spreads.** The left-hand page (used for even-numbered document pages) and right-hand page (used for odd-numbered document pages) of the master spreads you create will be — more or less — mirror opposites of each other. For example, page numbers are generally placed near the outside edge of facing pages so that they're visible when a reader thumbs through the pages. Or you may decide to place the publication name on one side of a spread and balance it by placing the date of publication in the same position on the other side.
- ♦ **If you want to automatically place page numbers on document pages, you should add a page number character on each page of your master spreads.** To add a page number character, draw a text frame with the Type tool, then choose Type ⇨ Insert Special Character ⇨ Auto Page Number or press Option+⌘+N or Ctrl+Alt+N. The prefix of the master page (A, B, C, and so on) is displayed on the master page, but on document pages, the actual page number is used. When you add a page number to a master page, make sure to format it as you want the actual page numbers to look on document pages.

- ◆ **Perhaps the most important elements of a master page are the margins and column guides.** To specify margins and columns for a master page, make sure the page is displayed in the document window, then choose **Layout ⇨ Margins and Columns**. The Margins and Columns dialog box, shown in Figure 7-3, is displayed. The controls in this dialog box let you specify the position of the margins, the number of columns, and the gutter width (space between columns).

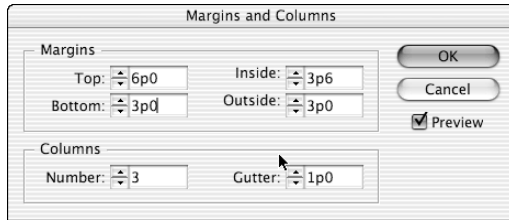


Figure 7-3: The Margins and Columns dialog box.



Tip

When placing text elements on master pages, you may want to use placeholder text instead of actual text. For example, if you produce a monthly magazine and you want to include the name of the month on each spread (perhaps opposite the name of the newsletter on the facing page), you could use placeholder text like “[Name of month]” or “[Add month here].” If you use placeholder text, format it as you want the actual text to look on document pages. Of course, be sure to replace the placeholder text with the actual text in your final document.

- ◆ If you want to place additional guidelines on a master page, you can add as many custom guidelines as you want. (Guidelines are covered later in this chapter.)
- ◆ Like objects on document pages, the objects you place on master pages have a stacking order. On document pages, all master objects remain beneath any objects you add to the page.

Figure 7-4 shows a typical master page spread for a newsletter. Whenever you want to make a change to a master page, double-click on its icon in the Pages pane to display it in the document window.



Tip

To copy a master page from one document to another, display the source document, click on the master’s name in the Pages pane, drag it to the window of the target document, and then release the mouse button.



The ability to move master pages from one document to another, or even from one layout to another in a QuarkXPress 6 project, does not exist in QuarkXPress. So QuarkXPress users may be in the habit of using libraries to transfer master-page items from one document to another. In InDesign, you don’t need to take this circuitous route.

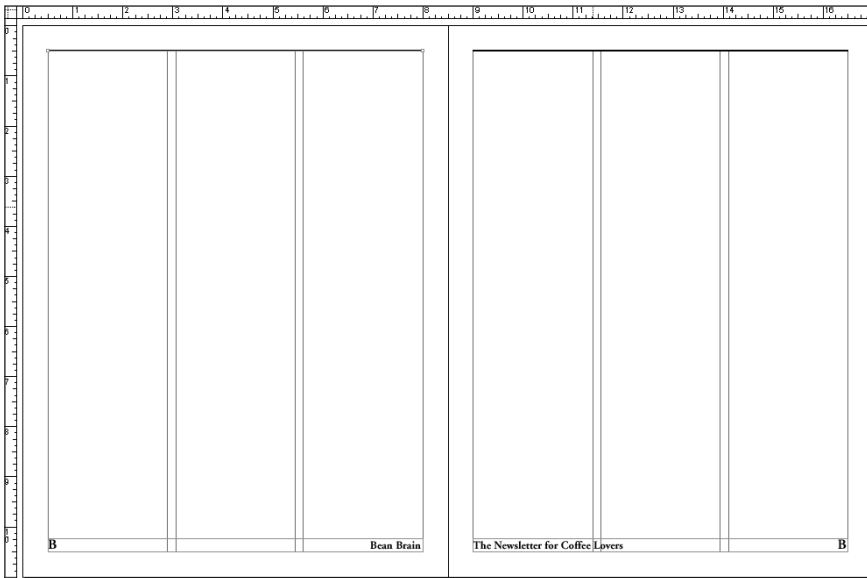


Figure 7-4: A typical three-column master layout for a newsletter. The footer at the bottom of the left- and right-hand pages includes a page-number character (B) on the outside.

Applying a master page to document pages

After you've built a master page, you can apply it to new document pages as you add them or to existing pages. (See Chapter 5 for information about adding and removing document pages.) For facing-page documents, you can apply both pages of a master spread to both pages of a document spread, or you can apply one page of a master spread to one page of a document spread. For example, you could apply a master page with a two-column format to the left-hand page of a document spread and apply a master page with a three-column format to the right-hand page.

To apply only one page of a master spread to a document page, click on the icon of the master spread and then drag it onto the icon of the document page you want to format. When the target document page is highlighted (framed in a black rectangle, as shown in the left side of Figure 7-5), release the mouse button. If both document pages are highlighted, both sides of the master spread are applied to the document spread.

To apply both pages of a master spread to both pages of a document spread, drag the master spread's icon onto the document spread's page numbers (under its page icon). When both pages of the target document spread are highlighted, as shown in the right side of Figure 7-5, release the mouse button.

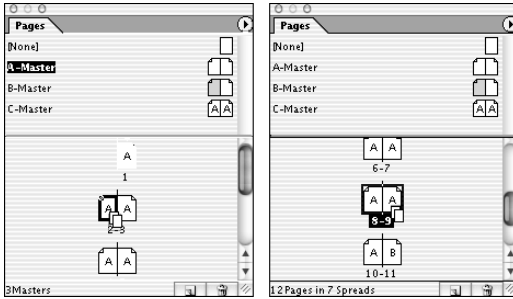


Figure 7-5: Left: Applying a single page of a master spread to a document page. Right: Applying both pages of a master spread to a document spread.

InDesign also lets you apply a master page to multiple document pages in a single operation. You can

- ♦ **Select the document pages to which you want to apply a master.** You can click on a page then Shift+click on another page to select a range of pages, or you can hold down the ⌘ or Ctrl keys and click on pages to select nonconsecutive pages. After you've selected the document pages, press Option or Alt and click on the master page you want to apply.
- ♦ **Choose Apply Master to Pages from the Pages pane's palette menu.** The Apply Master dialog box, shown in Figure 7-6, is displayed. Choose the master page you want to apply from the Apply Master pop-up menu and specify the pages to which you want to apply it in the To Pages field. Use commas to separate page numbers; use a hyphen to specify a range of pages. For example, you could enter **2, 4-6, 8** to apply the selected master to pages 2, 4, 5, 6, and 8.

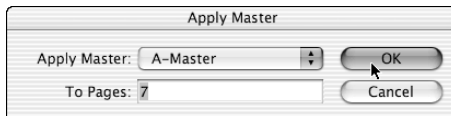


Figure 7-6: The Apply Master dialog box.

You can also use these techniques to apply a different master page to a document page. If you want to disassociate a document page from its applied master page, you can apply the default None master page the same way you apply any other master page.

Modifying master items on document pages

As you work on a document page that's based on a master, you may find that you need to modify, move, or delete a master object. For example, you might apply a master to the first page of a newsletter and then decide that the page number you've placed on the master page isn't necessary for page 1. In this case, you'd select the master object on the document page and delete it. Any change you make to a master object on a local page is referred to as a *local override*.

If you remove a master object from a document page, you sever the object's relationship to the master-page object for that document page only. If you subsequently move or modify the object on the master page, it won't affect the deleted object on the document page—it remains deleted on that particular document page.

However, you can modify a master object on a document page without completely breaking its relationship to the corresponding object on the master page. For example, if you change the size, position, or content of a master object on a document page, any subsequent size, position, or content change you make to the object on the master page does not affect the object you modified. But any changes you make to the stroke or fill of the object on the master page are applied to the overridden master object on the document page. Similarly, if you use any of the transformation tools or the corresponding controls in the Transform pane to modify a master object on a document page, any similar transformations applied to the corresponding object on the master page are not applied to the overridden object.

In other words, any type of attribute applied to the item on a particular document page prevents any changes to the same attribute on the master page from affecting that document page.



Tip

The Display Master Items command (View ⇨ Display Master Items) lets you show or hide master objects on document pages. When a checkmark is displayed next to the name of the command, master objects are displayed.

To modify a master object on a document page, you must select it. However, master objects behave slightly differently than other objects on document pages. Specifically, to select a master object on a document page, you must hold down Shift+⌘ or Ctrl+Shift when you click on the object with one of the selection tools. After you select a master object on a document page, you can modify it in the same manner as you modify non-master objects.

If you modify one or more master objects on a document page and then decide you want to revert back to using the original master objects, you can remove the local overrides. To do so, display the document page that contains the master

objects you've modified, select the objects, and then choose Remove Selected Local Overrides from the Pages pane's palette menu. If no objects are selected, the command name changes to Remove All Local Overrides (if the selected spread doesn't have any modified master objects, the command is not available).

Using Templates

A template is a preconstructed InDesign document that you use as the starting point for creating multiple versions of the same design or publication. For example, if you were assigned the task of creating ten testimonial ads that share the same layout but use different pictures and text, you would begin by creating a template that contains all the elements that are the same in every ad — placeholder frames for the pictures and text, guidelines, and so on. Along the same lines, if you produce periodicals like a newsletter or a magazine, you should create a template for each one.

The process of creating a template is much the same as creating a document. You create the required character and paragraph style sheets, master pages, repeating elements (for example, the nameplate on the first page and mailing information on the back page), and so on. The only thing you don't add to a template is actual content.

It would be nice if designers had the luxury of creating a template for each new publication they produced. But in the real world, templates are often created by gutting an existing document. The first time you create a publication such as a newsletter, the main goal during production is getting a finished document to the printer — hopefully on time. After you've finished the first issue of a publication (or a prototype), you can open the file, remove all objects and content that aren't repeated in every issue, and then save the gutted file as a template. This is probably how you'll wind up building many of your templates.

Here are the steps in creating a template:

- 1. Choose File ⇨ Save As or press Shift+⌘+S or Ctrl+Shift+S to display the Save As dialog box, shown in Figure 7-7.**
- 2. Choose a storage folder and specify a name for the file.**

It's not a bad idea to add "Template" to the filename, if possible. It lets whoever uses the file know its purpose.
- 3. On a Mac, choose InDesign 3.0 Template in the Format pop-up menu. On a PC, choose InDesign 3.0 Template from the Save As Type pop-up menu.**
- 4. Click OK to close the Save As dialog box and save the template.**

**Tip**

If you're designing a template that will be used by others, you might want to add a layer of instructions. When it's time to print a document based on the template, simply hide the annotation layer. (See Chapter 6 for more information about working with layers.)

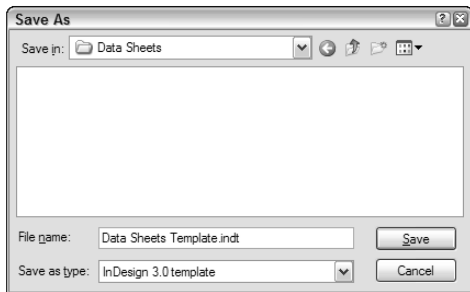
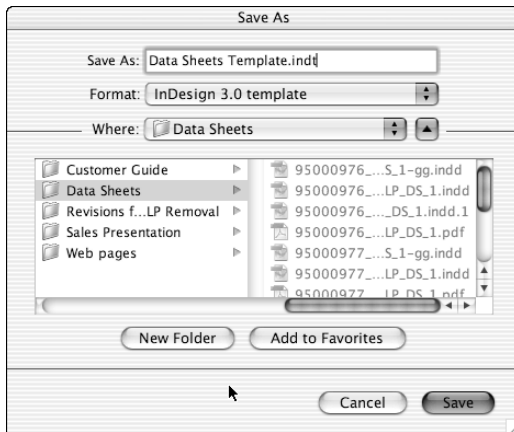


Figure 7-7: Saving templates is slightly different on a Mac (top) from saving templates in Windows (bottom).

A template is almost exactly the same as a standard InDesign document with one major exception: A template is slightly protected from being overridden. When you open a template, it's assigned a default name (Untitled-1, Untitled-2, and so on). The first time you choose File ⇧ Save, or press ⌘+S or Ctrl+S, the Save As dialog box is displayed.

**Note**

As you use a template over time, you're likely to discover that you forgot to include something—perhaps a style sheet, a repeating element on a particular master page, or an entire master page. To modify a template, you must open it, make your changes, and then use the Save or Save As command to save the file in the same place and with the same name as the original.

Storing Objects in Libraries

If you're a savvy InDesign user, you'll never build the same document twice. After all, that's what templates are for. Along the same lines, you never have to create the same object twice; that's what libraries are for. An InDesign library is a file — similar in some ways to a document file — in which you can store individual objects, groups and nested objects, ruler guides, and grids (ruler guides and grids are covered in the next section). For example, if you've created a logo in InDesign and you want to use it in other documents, you could place it in a library. Once you've saved an object in a library, it's as though you have an endless supply of copies. Every time you need a copy, all you have to do is drag one out of the library.

Creating a library is easy: Choose File ⇨ New ⇨ Library, choose a location to save the library in, give the library a name, and click OK. Figure 7-8 shows the dialog box.

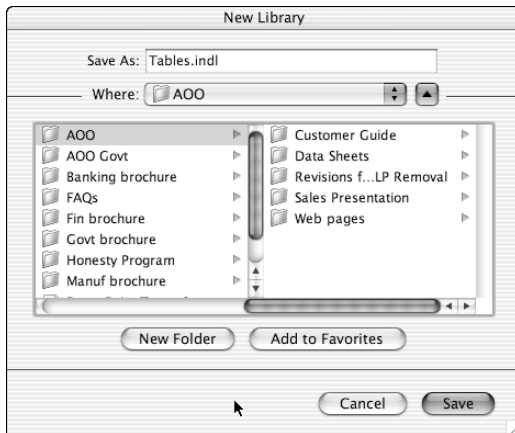


Figure 7-8: The dialog box in which you save a new library.

You can create as many libraries as you want and store them wherever is most convenient, including on a networked server so other InDesign users can share them. When it comes to naming and organizing libraries, the choice is yours. If you work for an advertising agency, for example, you may decide to create a separate library for each client; each library could contain logos, images, boilerplate text (disclaimers, copyright information, legal blurbs), and so on. If you work for an in-house art department, you could create separate libraries for corporate logos (black-and-white, grayscale, and two-color/four-color variations), house ads, frequently used pictures, and standing art.

**Tip**

InDesign libraries are cross-platform. That is, you can open libraries created on a Mac using a PC and vice versa. On the PC, libraries have the filename extension .indl, while on the Mac they don't have to have a filename extension. In a cross-platform environment, add the PC filename extensions even to Mac files so Windows InDesign will recognize the file as a library.

After you create a new library, an empty library pane is displayed, as shown in Figure 7-9. The name you assigned is displayed in its title bar. You add items by dragging them to the pane. You can group the pane with other panes (by dragging its tab onto another pane) or close it by clicking its close box or choosing Close Library from its pop-up menu.

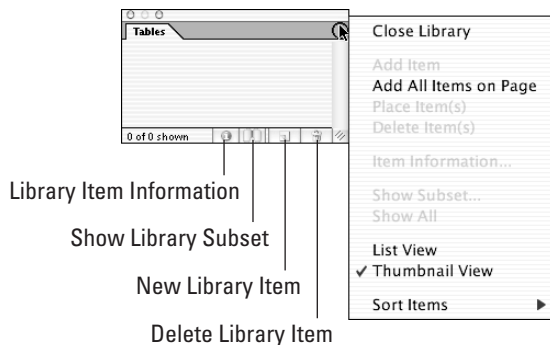


Figure 7-9: A new (empty) library and its accompanying pop-up menu.

At this point, you're ready to begin placing objects into the library, after which, you can begin copying the objects into other documents. Before we look at moving items into and out of libraries, here's a brief description of the controls in a library pane and the commands in the accompanying pop-up menu (refer to Figure 7-9):

- ♦ The numbers in the lower-left corner of the pane indicate the number of objects currently displayed in the pane (though not necessarily visible depending on the size of the pane) and the number of objects in the library. Search capabilities let you display a subset of the entire library.
- ♦ Clicking the Library Item Information button displays the Item Information dialog box, shown in Figure 7-10. Here you can assign a name, type, and description to a library object. (You can search for library objects based on these attributes.)
- ♦ The Show Library Subset button displays a dialog box that lets you locate and display objects that meet certain search criteria.

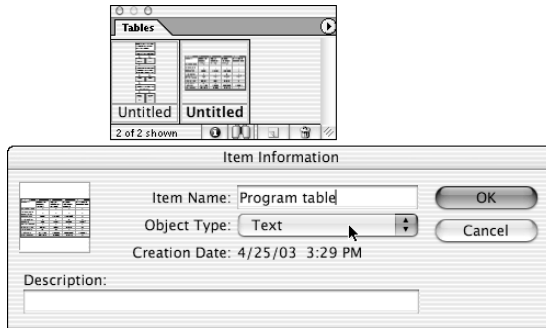


Figure 7-10: The Item Information dialog box.

- ♦ The New Library Item lets you add a selected object on a document page to a library.
- ♦ The Delete Library Item button lets you delete highlighted objects in the library.
- ♦ The Close Library palette menu command does the same thing as clicking a library pane's close box.



Note

If a library pane is part of another palette, if it is the frontmost palette, and if you close that palette, the library pane is closed as well. But if the library pane is not the frontmost pane in the palette, the library remains open when you close the palette.

- ♦ The Add Item and Add All Items on Page commands let you add a selected item or all items on a document page to a library. You can also simply drag items into the pane.
- ♦ The Place Item(s) command lets you place copies of selected library objects into a document.
- ♦ The Delete Item(s) command lets you remove selected library objects from the library.
- ♦ The Item Information command displays the Item Information dialog box (refer to Figure 7-10).
- ♦ The Show Subset command opens the same dialog box that's displayed if you click the Show Library Subset button. The dialog box lets you locate and display objects that meet certain search criteria.
- ♦ The Show All command displays all library objects (rather than a subset identified by a previous search).
- ♦ When the List View option is checked, library objects are displayed in a list rather than as Thumbnails.

- ◆ When the Thumbnails View option is checked, each library object is displayed in its own thumbnail window.
- ◆ The Sort Items command lets you sort library items by name, type, and date.

To open an existing library, choose File ⇨ Open or press ⌘+O or Ctrl+O.

**Note**

Multiple users can share a library, but only if it's locked (meaning people can use items in the library but not add new ones). To lock a library on the Mac, locate the library file in the Finder, select it, choose File ⇨ Get Info, and select the Locked option. In Windows, locate the library file in its current folder, right-click the file-name or icon, then select Read-Only from the Properties contextual menu's General pane.

To delete a library, you must delete the file. Either drag the file icon to the Trash (Mac) or move the file icon to the Recycle Bin (Windows).

Adding and deleting library objects

In addition to placing individual objects, such as text and graphics frames, into a library, you can also place multiple-selected objects, groups, nested frames, ruler guides, guidelines, and all objects on a page.

There are several ways to add objects to a library. You can

- ◆ Select one or more objects and then drag and drop them into an open library pane.
- ◆ Select one or more objects and then click the New Library Item button at the bottom of an open library pane.
- ◆ Select one or more objects and then choose Add Item from the pop-up menu of an open library pane.
- ◆ Choose Add All Items on Page from the pop-up menu of an open library pane to add all objects on the current page or spread.

**Tip**

If you hold down the Option or Alt key when adding an object to a library using any of the preceding methods, the Item Information dialog box is displayed. This dialog box lets you add searchable attributes to the object.

To delete a library object, drag its icon to the Trash icon at the bottom of the pane or click on the object once and then choose Delete Item(s) from the library pane's palette menu. You can select a range of objects by clicking on the first one and then Shift+clicking on the last one. You can select multiple, noncontinuous objects by holding down the ⌘ or Ctrl key and clicking on their icon.

Library caveats

Because the attributes of the original object are retained when you place a copy in a library, there are some pitfalls you have to watch out for:

- ♦ **If you move, modify, or delete the original graphic files associated with a picture you've placed in a library and then copy the library object into a document, the Links pane will report that the graphics file is modified or missing (just as it would if you imported the picture then moved, modified, or deleted the original).** It's a good idea to store graphics files used in libraries in a common location, such as in a Standards folder on the network, so the graphics files aren't accidentally moved or deleted when you delete or archive a set of project files that happen to contain objects placed in libraries.
- ♦ **If you copy a text frame from a library onto a document page, any character style sheets, paragraph style sheets, or colors in the library object that have the same name as character style sheets, paragraph style sheets, or colors in the target document are replaced by those in the target document.** If the target document does not contain character style sheets, paragraph style sheets, or colors in the placed text, they're added to the document.
- ♦ **If you copy a text frame from a library onto a document page, make sure that the fonts are available.** If they're not available, you'll have to choose alternate fonts.

When you place an object into a library, all its attributes are saved. For example, if you import a picture into a document and then place a copy of the picture into a library, the path to the original picture file is saved, as are any transformations you've applied to the picture or its frame (scale, rotation, shear, and so on). If you save text in a library, all formats, including style sheets, are retained.

Cataloging library objects

If your libraries contain only a few objects, finding the one you're looking for won't be very hard. But a library can hold as many objects as you want, and as a library becomes bigger, locating a particular object gets increasingly difficult. To make library objects easier to find, InDesign lets you tag them with several searchable attributes.

To tag a library element, select it and then choose Item Information from the library pane's palette menu. You can also display the Item Information dialog box by double-clicking on a library object or by clicking once on a library object and then clicking the Library Item Information icon at the bottom of the library pane. (Figure 7-10 shows the Item Information dialog box.) Now specify a Name, Object Type, and/or Description. In the Description field, it's a good idea to enter one or more

keywords that describe the object so that you can easily find it later. Click OK to close the dialog box and return to the document.

InDesign lets you search for library objects based on the information specified in the Item Information dialog box. For example, if you've placed several different corporate logos into a library that includes many other objects, you could search for the term *logo* in the Name or Description field. If you used the word *logo* in either of these fields for your logos, a search of these fields for the word *logo* will identify and display your logos. The ability to search for library objects based on name and description is a good reason to name your library objects carefully and consistently and to specify keywords in the Description field of the Item Information dialog box. Follow these steps:

1. **Choose Show Subset from a library pane's palette menu or click on the Show Library Subset icon at the bottom of the pane.**

The Subset dialog box, shown in Figure 7-11, is displayed.

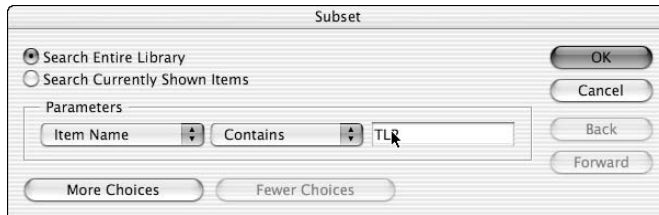


Figure 7-11: The Subset dialog box.

2. **To search the entire library, click Search Entire Library; to search only the objects currently displayed in the page, click Search Currently Shown Items.**
3. **From the leftmost pop-up menu in the Parameters area, choose the Item Information category you want to search: Item Name, Creation Date, Object Type, or Description.**
4. **From the next pop-up menu choose Contains if you intend to search for text contained in the chosen category; choose Doesn't Contain if you want to exclude objects that contain the text you specify.**
5. **In the rightmost field, type the word or phrase you want to search for (if Contains is selected) or exclude (if Doesn't Contain is selected).**
6. **To add more search criteria, click More Choices; to reduce the number of search criteria, click Fewer Choices.**

You can add up to five levels of search criteria.

7. To display objects that match all search criteria, select **Match All**; to display objects that match any of the search criteria, select **Match Any One**.

These options are available only if two or more levels of search criteria are displayed.

8. Click **OK** to conduct the search and close the dialog box.

All the objects that match the search criteria are displayed in the pane. The pane is empty if no objects matched the search criteria. If you want to display all objects after conducting a search, choose **Show All** from the library pane's palette menu.



Tip

The **Sort Items** command in a library pane's palette menu lets you sort objects by **Name**, **Oldest**, **Newest**, and **Type**. If you sort by **Oldest** or **Newest**, items are arranged based on the order in which they were placed into the library.

Copying library objects onto document pages

Once you've placed an object into a library and, optionally, specified item information for the object, you can place copies of the library object into any document or into another library. To place a copy of a library object onto the currently displayed document page, click on the object's icon in the library pane and drag it onto the page. As you drag, the outline of the library object is displayed. Release the mouse button when the outline is positioned where you want to place the object. You can also place a library object onto a document by clicking on its icon and then choosing **Place Item(s)**.



Tip

You can copy an object from one library to another by dragging its icon from the source library pane and dropping it onto the target library pane. If you hold down the **Option** or **Alt** key when dragging and dropping an object between libraries, the original object is removed from the source library (in effect moving it from one library to the other).

Using Ruler Guides and Grids

If you've ever seen a carpenter use a chalked string to "snap" a temporary line to use as an aid for aligning objects, you understand the concept behind guidelines. They're not structurally necessary and they don't show in the final product, yet they can still make your work easier. InDesign lets you create and display three types of nonprinting guidelines:

- ♦ *Ruler guides* are moveable guidelines that you can create by hand or automatically. They're helpful for placing items precisely and aligning multiple items.

- ♦ A *baseline grid* is a series of horizontal lines that help in aligning lines of text and objects across a multicolumn page. When displayed, a baseline grid makes a page look like a sheet of lined paper.
- ♦ A *document grid* is a crisscross of horizontal and vertical lines that aid in object alignment and placement.

InDesign's grids and guides capabilities verge on overkill. Chances are you'll end up using a combination of ruler guides and the baseline or ruler guides and the document grid, but using all three is more complicated than necessary.

Ruler guides

InDesign lets you create individual ruler guides manually or a set of ruler guides automatically with the Create Guides command (Layout ⇨ Create Guides).

Creating ruler guides manually

To create manual ruler guides, go to the page or spread onto which you want to place ruler guides. (If the rulers are not displayed at the top and left of the document window, choose View ⇨ Show Rulers or press ⌘+R or Ctrl+R.) Now click on the horizontal ruler or vertical ruler, and drag the pointer onto a page or the pasteboard. Release the mouse button when the guideline is positioned where you want it. If you release the mouse when the pointer is over a page, the ruler guide extends from one edge of the page to the other (but not across a spread). If you release the mouse button when the pointer is over the pasteboard, the ruler guide extends across both pages of a spread and the pasteboard. If you want a guide to extend across a spread and the pasteboard, you can also hold down the ⌘ or Ctrl key as you drag and release the mouse when the pointer is over a page.

**Tip**

You can place both a horizontal and vertical guide at the same time by pressing ⌘ or Ctrl and dragging the ruler intersection point onto a page.

Ruler guides are cyan in color (unless you change the color using Layout ⇨ Ruler Guides) and are associated with the layer onto which they're placed. You can show and hide ruler guides by showing and hiding the layers that contain them. You can even create layers that contain nothing but ruler guides and then show and hide them as you wish. (See Chapter 6 for more information about layers.)

**Tip**

You can also place a guide that extends across the page or spread and pasteboard by double-clicking on the vertical or horizontal ruler.

**Tip**

If you want to create ruler guides for several document pages, create a master page, add the guides to the master page, and then apply the master to the appropriate document pages.

Creating a set of guides automatically

Follow these steps to create a set of ruler guides:

1. If the document contains multiple layers, display the Layers pane (Window ⇨ Layers or F7) and click the name of the layer to which you want to add guides.



See Chapter 6 for more information about layers.

2. Choose Layout ⇨ Create Guides.

The Create Guides dialog box, shown in Figure 7-12, is displayed. Check Preview if you want to see the guides on the current document page as you create them.

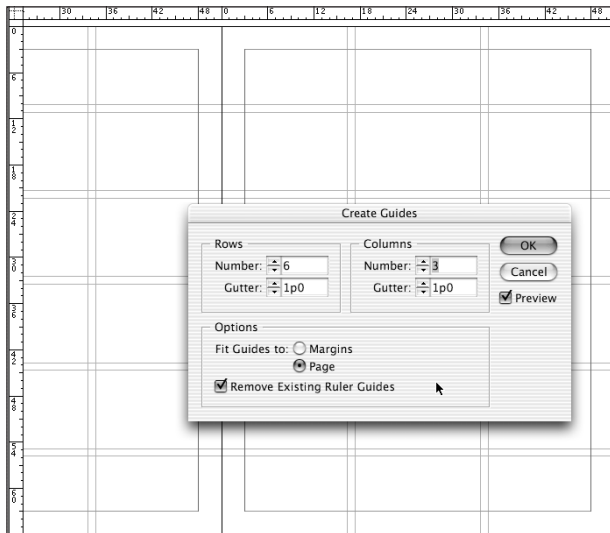


Figure 7-12: The Create Guides dialog box, along with the guides it created.

3. In the Rows and Columns areas specify the number of guides you want to add in the Number fields and, optionally, specify a Gutter width between horizontal (Rows) and vertical (Columns) guides.

Enter 0 in the Gutter fields if you don't want gutters between guides.

4. In the Options area, click Margins to fit the guides in the margin boundaries; click Page to fit the guides within the page boundary.

5. Check **Remove Existing Ruler Guides** to remove any previously placed ruler guides.
6. When you're done specifying the attributes of the ruler guides, click **OK** to close the dialog box.

Working with ruler guides

Once you've created ruler guides, you can show or hide them, lock or unlock them, and select and move, copy and paste, or delete one or more guides at a time. Here are a few pointers for working with ruler guides:

- ♦ To display or hide ruler guides, choose **View ⇨ Show/Hide Guides** or press **⌘+;** (semicolon) or **Ctrl+;** (semicolon).
- ♦ To lock or unlock all ruler guides, choose **View ⇨ Lock Guides** or press **Option+⌘+;** (semicolon) or **Ctrl+Alt+;** (semicolon). (If **Lock Guides** is checked, ruler guides are locked.)
- ♦ To select a ruler guide, click on it with a selection tool. To select multiple guides, hold down the **Shift** key and click on them. The color of a selected guide changes from blue to the color of its layer. To select all ruler guides on a page or spread, press **Option+⌘+G** or **Ctrl+Alt+G**.
- ♦ To move a guide, click and drag it as you would any object. To move multiple guides, select them and then drag them. To move guides to another page, select them, choose **Edit ⇨ Cut**, or **⌘+X** or **Ctrl+X**, or **Edit ⇨ Copy**, or **⌘+C** or **Ctrl+C**, display the target page, then choose **Edit ⇨ Paste**, or **⌘+V** or **Ctrl+V**. If the target page is the same shape as the source page, the guides are placed in their original position.
- ♦ To delete ruler guides, select them and then press **Delete** or **Backspace**.
- ♦ To change the color of the ruler guides and the view percentage above which they're displayed (the default view threshold is 5 percent), choose **Layout ⇨ Ruler Guides**. The **Ruler Guides** dialog box, shown in Figure 7-13, is displayed. Modify the **View Threshold** value and choose a different color from the **Color** pop-up menu, and then click **OK**. If you change the settings in the **Ruler Guides** dialog box when no documents are open, the new settings become defaults and are applied to all subsequently created documents.

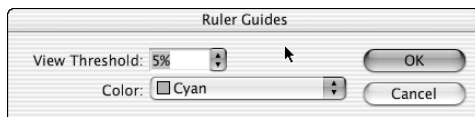


Figure 7-13: The Ruler Guides dialog box.

- ◆ To display ruler guides behind objects instead of in front, choose InDesign ⇨ Preferences ⇨ Guides & Pasteboard on the Mac or Edit ⇨ Preferences ⇨ Guides & Pasteboard in Windows, or press ⌘+K or Ctrl+K, and check Guides in Back in the Guide Options section of the dialog box.
- ◆ If the Snap to Guides command (View ⇨ Snap to Guides, or Shift+⌘+; [semicolon] or Ctrl+Shift+; [semicolon]) is checked, objects edges will snap to ruler guides when you drag them in the snap zone. To specify the *snap zone* (the distance—in pixels—at which an object will snap to a guide), choose InDesign ⇨ Preferences ⇨ Guides & Pasteboard on the Mac or Edit ⇨ Preferences ⇨ Guides & Pasteboard in Windows, or press ⌘+K or Ctrl+K, and enter a value in the Snap to Zone field in the Guide Options section of the dialog box.

Working with the baseline grid

Every new document you create includes a baseline grid. If the document you're working on uses a multicolumn page layout, a baseline grid can be helpful for aligning text baselines across columns and for ensuring that object edges align with text baselines. Baseline grids aren't much use for small documents—business cards, ads, and so on—and one-column designs. Here's how to create them:

1. Choose InDesign ⇨ Preferences ⇨ Grids on the Mac or Edit ⇨ Preferences ⇨ Grids in Windows, or press ⌘+K or Ctrl+K and choose the Grids pane.

The Grids pane, shown in Figure 7-14, is displayed.

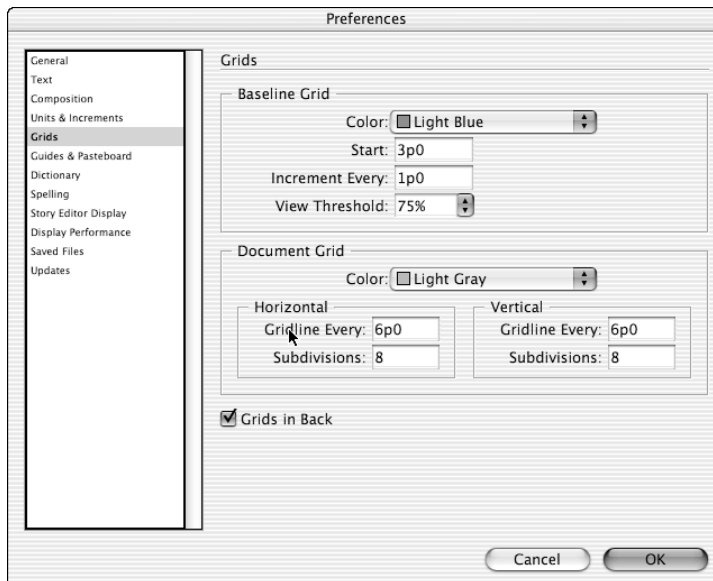


Figure 7-14: The Grids pane of the Preferences dialog box.

2. Choose a color from the Color pop-up menu in the Baseline Grid area.
3. In the Start field, enter the distance between the top of the page and the first grid line.

If you enter 0, the Increment Every value determines the distance between the top of the page and the first grid line.

4. Enter the distance between grid lines in the Increment Every field.

Generally, the value you enter in this field will be the same as the leading value you use for the publication's body text.

5. Choose a View Threshold percentage from the pop-up menu or enter a value in the field.

Generally, you don't want to display the baseline grid at reduced view percentages because grid lines become tightly spaced.

6. Click OK to close the dialog box and return to the document.

A baseline grid is document-wide (that is, you can't change it from page to page), and grid lines are displayed behind all objects, layers, and ruler guides. The default baseline grid begins a ½ inch from the top of a document page, the grid lines are light blue lines and placed 1 pica apart; and grid lines are displayed at view percentages above 75 percent. If you change any of these settings when no documents are open, the changes are applied to all subsequently created documents; if a document is open, changes apply only to that document.



Tip

The Show/Hide Baseline Grid command (View ⇨ Show/Hide Baseline Grid, or Option+⌘+' [apostrophe] or Ctrl+Alt+' [apostrophe]) lets you display and hide a document's baseline grid.

Working with the document grid

Like the baseline grid, every document includes a default *document grid*, which is a set of horizontal and vertical lines. And like baseline grids, you may or may not find the document grid to be a useful aid for laying out pages. If you like working on graph paper in the real world, the document guide may be just your cup of tea. On the other hand, you may find document grids to be too constricting and opt not to use them. If you want to use document grids, follow these steps:

1. Choose InDesign ⇨ Preferences ⇨ Grids on the Mac or Edit ⇨ Preferences ⇨ Grids in Windows, or press ⌘+K or Ctrl+K.
2. Choose a color from the Color pop-up menu in the Document Grid area.
3. Enter the distance between grid lines in the Gridline Every field.

If your basic measurement unit is an inch, you'll probably want to use the default value of 1 inch.

4. Enter the number of divisions between grid lines in the Subdivisions field.

If your basic measurement unit is an inch, you can specify a value of 6 to subdivide the grid into 1-pica squares. Or, if you prefer, you can enter a value of 4, 8, 16, and so on to subdivide the grid into standard divisions of an inch.

5. Click OK to close the dialog box and return to the document.**Tip**

The Show/Hide Document Grid command (View⇨ Show/Hide Document Grid or ⌘+' [apostrophe] or Ctrl+' [apostrophe]) lets you display and hide the document grid.

Summary

If you want to be a true InDesign expert, you must take advantage of three of its most powerful features: master pages, templates, and libraries. All these features save time and ensure design consistency across documents. A master page is a preformatted page design that you can apply to document pages in a multipage publication; a template is a preconstructed document that serves as the starting point when you need to create multiple versions of the same publication; and a library is a storage file in which you can save any object you've created with InDesign for use in other publications.

To help you place and align objects, InDesign lets you create three types of guidelines: ruler guides, the baseline grid, and the document grid. You can show or hide guidelines, and you have the option to snap object edges to guidelines when you drag them in the specified snap zone.

