REAL WORLD

ADOBE® InDesign® CS6

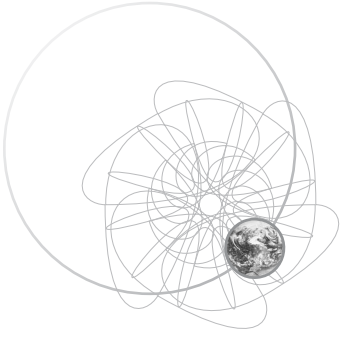
INDUSTRIAL-STRENGTH PUBLISHING TECHNIQUES

What designers and production artists need to know

Tips and tricks for maximum efficiency

For print and web / mobile devices

OLAV MARTIN KVERN, DAVID BLATNER, AND BOB BRINGHURST



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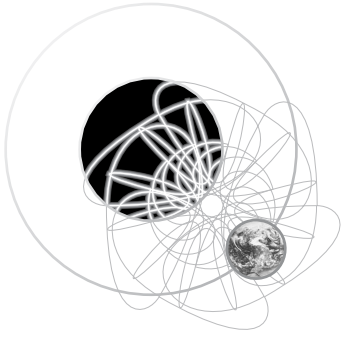

Real World Adobe InDesign CS6

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Peachpit Press

for Amy and Max
&
Gabriel and Daniel
&
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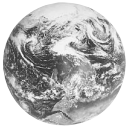

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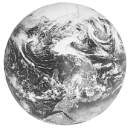
INTRODUCTION



We're publishers—just like you. We've been through the long shifts, entering and editing text, setting type, importing images, and trying to get files to print. On most of those late nights and early mornings, we could have been home in bed if we had known just one key piece of information. But we weren't. There was no one there to tell us.

We're here to tell you.

If some piece of information in this book saves you one late night, we will have succeeded in our purpose.

How This Book Was Produced

To answer the question we've been asked so many times: Yes, we produced this book in Adobe InDesign. We created art using Snapz Pro, SnagIt, Photoshop, Illustrator, and InDesign's tools.

We used Adobe's Minion Pro family for our body text—a workhorse typeface that manages to look both modern and classical at the same time. For code, we used TheSansMonoCondensed, by Lucas de Groot (from lucasfonts.com).

Bonus Materials

If we included everything we wanted—obscure features, charming anecdotes, and so on—this book would be over 2,000 pages.

We cut a lot of information out of this book to keep the size down. Bonus materials include XML workflow information (an entire chapter), scripting resources, and more. To access this material on the web, you will need to register your book. Go to this link:

www.peachpit.com/realworldindesigncs6

After you've registered, click "Access to protected content" next to the book title in your registered products list.

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David: "My deepest appreciation to my wife and partner, Debbie Carlson, as well as to our sons Gabriel and Daniel, who ensured that sanity wouldn't gain the upper hand. My thanks, too, go to Anne-Marie, Niyaz, Ted Falcon, and many other friends and helpers."

Ole: "Thanks to my incredible friends, to my partner, Amy Lanset, and to my son, Max Olav Kvern, for their love and support."

Bob: "I'm grateful for my wife Wendy, as well as to my twin sons Luke and Max, who agreed to be ignored for a couple months."

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Type

CHAPTER 4

Ole's tale: "Late night. The pale glow from the monochrome monitor of my Compugraphic phototypesetter. The smell of the office standard 'French Vanilla' coffee—warming, now, for several hours and resembling nothing so much as battery acid. The gentle snoring of one of the staff writers, who is curled up in the warmth of the unit that holds the filmstrips containing the fonts I'm using to set his story.

"These are the things I think of when I hear the word 'typesetting'—they're memories from my job at Seattle's free rock and roll newspaper *The Rocket*, circa 1982. Desktop publishing didn't exist yet, and digital (as opposed to photo) typesetting systems—with their WYSIWYG displays—were rare. The codes and characters I saw on my screen wouldn't look anything like type until they were printed, one character at a time, on a strip of photographic film and developed. I could set just about any kind of type using that machine, provided the characters would fit on a piece of film not more than seven inches wide, and provided I didn't need to use characters from more than six fonts."

When desktop publishing appeared, we found that it couldn't do everything Ole could do with his Compugraphic—but that being able to see what our type would look like *before we printed it* more than made up for any deficiencies. These days, page layout programs are far more capable than Ole's trusty EditWriter. Does that mean, however, that there's no more room for improvement? For surprising new features? Is typesetting "done"?

Not a chance—InDesign offers a number of improvements and surprises in the area of typesetting. It's an evolutionary product—not a revolutionary one, but, on its release, InDesign became the best desktop typesetting program, and raised the bar for its competition.

In this chapter, we'll walk through InDesign's typesetting features. We'll start with character formatting (font, point size, kerning, and baseline shift are examples of character formatting), move on to paragraph formatting (indents, tabs, space above and below, and composition), and then dive into formatting using character and paragraph styles. Along the way, there may be a joke or two.

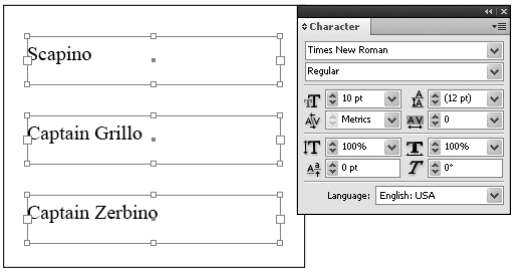
Selecting and Formatting Text

Generally, when you want to change the formatting of some text, you have to select it with the Type tool. However, there are two caveats to this statement. First, because paragraph formatting (which we'll discuss later) always applies to an entire paragraph, you don't have to select every character in the paragraph before applying it.

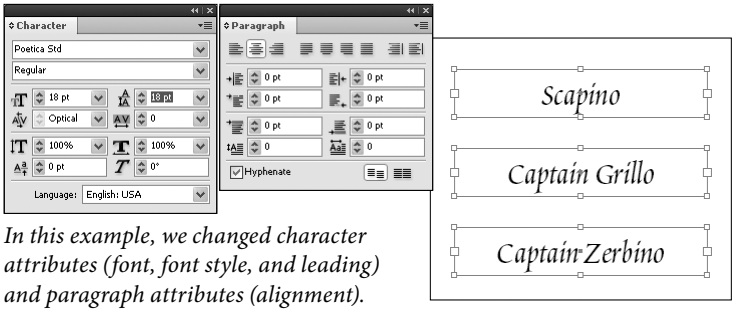
Second (and more interesting) is that you can apply text formatting to text frames you've selected using the Selection tool or the Direct Selection tool. When you do this, InDesign applies the formatting to all of the text in the text frame, including any overset text. InDesign won't let you use this method to apply formatting to text frames that are linked to other text frames. Tired of using the Type tool to select and format every photo caption on a page? Use the Selection tool to select them all and apply your formatting—it's easier, and it's quicker (see Figure 4-1).

FIGURE 4-1
Formatting the Text in Text Frames

Use the Selection tool to select the text frames you want to format…



…and apply formatting. InDesign applies the formatting to all of the text in the text frames. That's all there is to it.



In this example, we changed character attributes (font, font style, and leading) and paragraph attributes (alignment).

The ability to apply formatting with the Selection tools is very powerful, but it's also slightly dangerous. Let's say you set a single character to Zapf Dingbats somewhere in your text frame. If you select the text frame using the Selection tool and then apply a new font, every character—including that dingbat—gets changed.

The only warnings that InDesign gives you that some of the text in the selected text frame uses a different font are: the Font field in the Character panel is blank, and the Font submenu (under the Type menu) has hyphens next to each font.

Character Formatting

Character formatting controls the appearance of the individual letters in your publication. Font, type size, color, and leading are all aspects of character formatting. (Longtime QuarkXPress users won't think of leading as a character format, but we'll cover that next.)

We refer to all formatting that can be applied to a selected range of text as "character" formatting, and refer to formatting that InDesign applies at the paragraph level as "paragraph" formatting. Tab settings, indents, paragraph rules, space above, and space after are examples of paragraph formatting. There are areas of overlap in these definitions. Leading, for example, is really a property that applies to an entire *line* of text (InDesign uses only the largest leading value in a line), but we'll call it "character" formatting, nonetheless, because you can apply it to individual characters.

In addition to these distinctions, InDesign's paragraph styles can include character formatting, but apply to entire paragraphs. See "Styles," later in this chapter.

Character Formatting Controls

InDesign's character formatting controls are found in both the Character panel and the Control panel (see Figure 4-2). The controls in the panels are substantially the same, so we'll discuss them once.

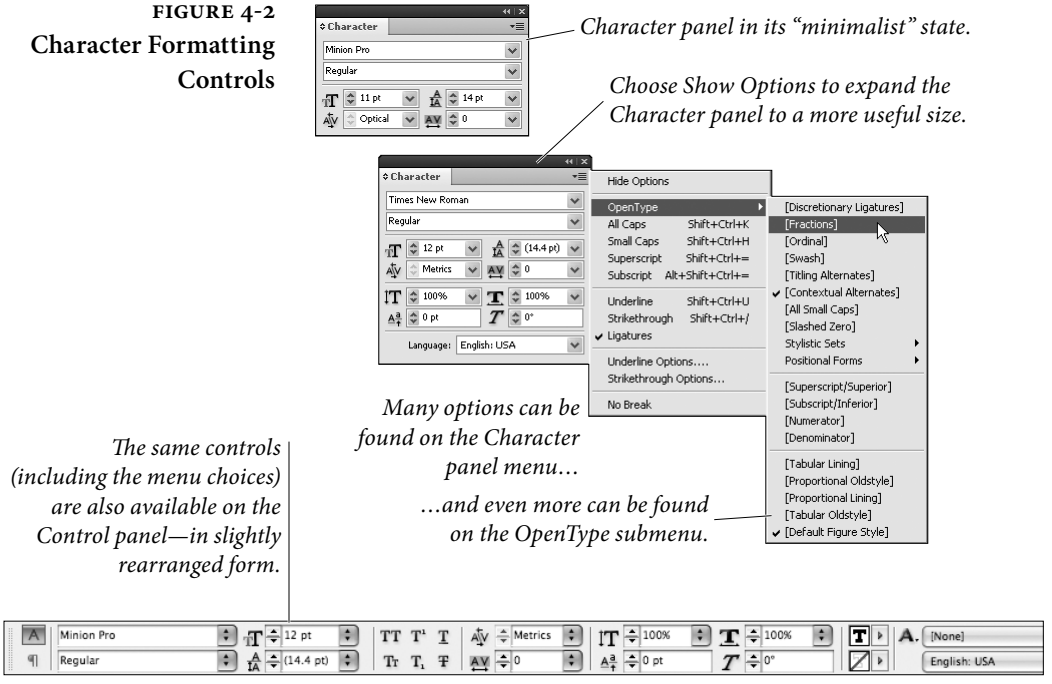
To display the Character panel and shift the focus to the panel's Font field, press Command-T/Ctrl-T. If the panel is already visible, InDesign hides it; you may need to press it twice.

To display the Control panel, press Command-Option-6/Ctrl-Alt-6. If the panel is already open, but is displaying the paragraph controls, press Command-Option-7/Ctrl-Alt-7.

Font Family and Font

Selecting a font in InDesign is a little bit different than selecting a font in most other page layout programs. To InDesign, fonts are categorized as font "families," and each family is made up of one or

FIGURE 4-2
Character Formatting Controls



more type styles. A font family is a set of typefaces designed to have a common "look." A "font," then, is specified by its font family and type style. In this book, we've used the font family Minion Pro, and the type style Regular for the body text—so the font of the body text is "Minion Pro Regular."

InDesign's user interface for selecting fonts mirrors this approach. When you choose a font from the Font submenu of the Type menu, you must select both the font family and a specific type style.

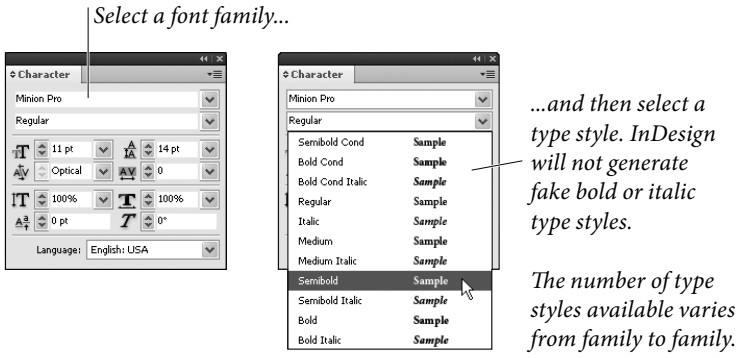
Note that InDesign does not have "type styles" in the same way that other programs do—it makes no assumption that the selected font family has a "bold" or "italic" member, and will never *generate* a fake bold or italic version. If you don't have a font for a particular type style, you won't see it on the Type Styles menu (see Figure 4-3).

To select a font family or type style, you can type into the appropriate field—you don't have to use the menu. As you type the name of a font family or type style, InDesign will display the available font or fonts that match the characters you typed. For instance you can type "T" and it will guess "Tekton" (if you have that font installed); if you meant "Times" then you may have to type "Ti" or even "Tim". Note that you can also press the up and down arrow keys, which is especially helpful in the Style field to move from Regular to Bold to Italic, and so on.

The most recently used fonts appear at the top of the Font submenu.

FIGURE 4-3
Selecting a Font

On the Mac OS, you can choose the family and style from the Font pop-up menu in a single step.



Font Style Keyboard Shortcuts. Although InDesign won't generate a bold or italic weight, you can type Command-Shift-B/Ctrl-Shift-B to make your text bold and Command-Shift-I/Ctrl-Shift-I to make it italic. If a font doesn't have a bold or italic version, InDesign will not change the text.

Symbols and Dingbats. Sometimes, when you change to a symbol font (such as Zapf Dingbats), you may encounter font substitution (the dreaded pink highlight). This can happen because InDesign is attempting to map the character from one font to another. To avoid this problem, hold down Shift as you apply the font.

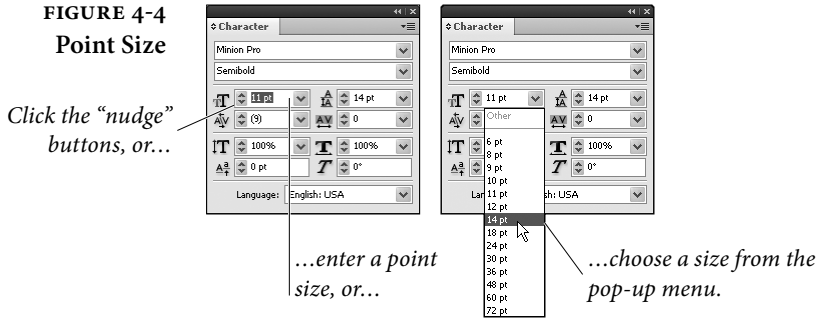
Duplicate Font Names. Some folks have more than one font with the same name on their systems—such as a TrueType and a PostScript version of Times Roman. While most programs just pick one (and you never know which you're getting), InDesign displays both fonts, including either T1 or TT in parentheses after the font name.

Size

You can change the size of text by entering the point size you want in the Size field of the Character or Control panel, or choose a point size from the attached pop-up menu (see Figure 4-4). If you type the size, you can specify it in .001-point increments. After you've entered the size you want, apply the change by pressing Return/Enter or by pressing Tab to move to another field.

Size Adjustment Keyboard Shortcuts. You can increase the size of selected type by pressing Command-Shift->/Ctrl-Shift->, or decrease the size by pressing Command-Shift-</Ctrl-Shift-<. The amount that InDesign increases or decreases the point size when you use these shortcuts depends on the value in the Size/Leading field in the Units & Increments Preferences dialog box.

FIGURE 4-4
Point Size



To increase or decrease the size of the selected text by five times the value entered in the Size/Leading field, you can add the Option or Alt key: Command-Option-Shift->/Ctrl-Alt-Shift->, or Command-Option-Shift-</Ctrl-Alt-Shift-<.

Scaling Text by Scaling the Frame. You can scale text by scaling the frame itself. To do this, select the text frame with the Selection tool, then hold down the Command/Ctrl key and drag a corner or side handle. Hold down Command-Shift/Ctrl-Shift as you drag to scale proportionally (a good thing, as far as text is concerned).

Leading

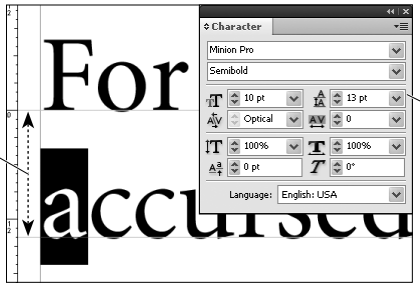
Text characters—usually—sit on an imaginary line, the *baseline*. *Leading* (pronounced "ledding") is the vertical distance from the baseline of one line of text to the next text baseline. When you hear "10 on 12" or see "10/12", it means "10-point text on 12-point leading." In InDesign, leading is measured from the baseline of a line of text to the baseline of the line of text above (see Figure 4-5). When you increase the leading in a line, you push that line farther from the line above it, and farther down from the top of the text frame.

In InDesign—as in PageMaker—leading is an attribute of individual characters, but the largest leading value in a line predominates (see Figure 4-6). This differs from QuarkXPress, where leading is a paragraph attribute (although if you use QuarkXPress's relative leading mode, the largest leading in a line predominates).

For those of us who came to desktop publishing from typesetting, the idea of leading being a character attribute seems more natural than QuarkXPress' method of setting it at the paragraph level. Fortunately, InDesign lets you have it both ways: When you turn on the Apply Leading to Entire Paragraphs option in the Type pane of the Preferences dialog box, the program automatically sets the leading of every character in a paragraph to the same value. QuarkXPress users will probably want to turn this option on.

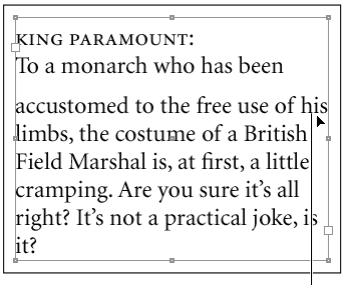
FIGURE 4-5
Leading

Leading is the distance from the baseline of one line to the baseline of the line above it.

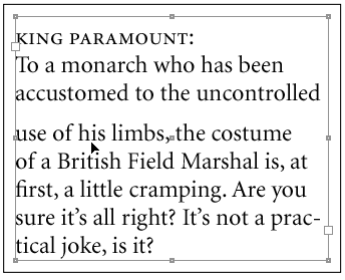


You set the leading of selected characters using the Leading control—enter a value, click the arrows, or choose a value from the pop-up menu. You can also choose Auto from the pop-up menu to base the leading on the point size of the text.

FIGURE 4-6
The Largest Leading in a Line Wins



This word has a larger leading value than the other characters in the line.



When the word moves to another line (due, in this example, to a change in the text), the larger leading is applied to that line.

However, this preference only affects paragraphs that you change *after* you set it. For instance, you could have it on most of the time, then turn it off in order to vary the leading of lines within a paragraph—something you sometimes have to do to optically balance display copy—and then turn the preference back on again.

How to Avoid Wacky Leading. The main disadvantage of making leading a character attribute (when the Apply Leading to Entire Paragraphs option is turned off) is that it requires a bit more vigilance on your part than the "leading-as-a-paragraph-attribute" approach taken by QuarkXPress and most word processors. Most of the time, leading values should be the same for all of the characters in the paragraph. If, as you apply leading amounts, you fail to select all of the characters in a paragraph, you'll get leading that varies from line to line—which, most of the time, is a typesetting mistake.

You can also get this effect if you leave your paragraph's leading set to the default Auto leading, which always sets the leading to some percentage (usually 120%) of the text size—or, more specifically, some percentage of the largest character on a line. This is true even when Apply to Entire Paragraph is turned on. We strongly urge you not to use Auto leading (except for inline frames and graphics, as discussed in Chapter 6, "Where Text Meets Graphics").

If you've seen paragraphs where the leading of the last line of the paragraph is clearly different from that of the lines above it, you know exactly what we're talking about (see Figure 4-7).

It's simple—the carriage return, that sneaky invisible character, can have a different leading value than the other lines in the paragraph. When the person formatting the text selected the paragraph, they failed to select the carriage return. To avoid this, make sure you select the entire paragraph before applying formatting. Better yet, apply a paragraph style. When you apply a paragraph style, InDesign applies the character formatting specified in the style—including leading—to every character in the paragraph.

Leading Shortcuts. You can decrease the leading of selected type by pressing Option-Up arrow/Alt-Up arrow, or increase the size by pressing Option-Down arrow/Alt-Down arrow. (Yes, this does seem counterintuitive; think of it as pushing the line up or down.) The amount that InDesign increases or decreases the leading depends on the value you entered in the Size/Leading field in the Units & Increments Preferences dialog box (for more on units and increments, see Chapter 1, "Workspace").

To decrease the leading of the selected text by five times the value in the Size/Leading field, press Command-Option-Up arrow/Ctrl-Alt-Up arrow. To increase the leading by the same amount, press Command-Option-Down arrow/Ctrl-Alt-Down arrow.

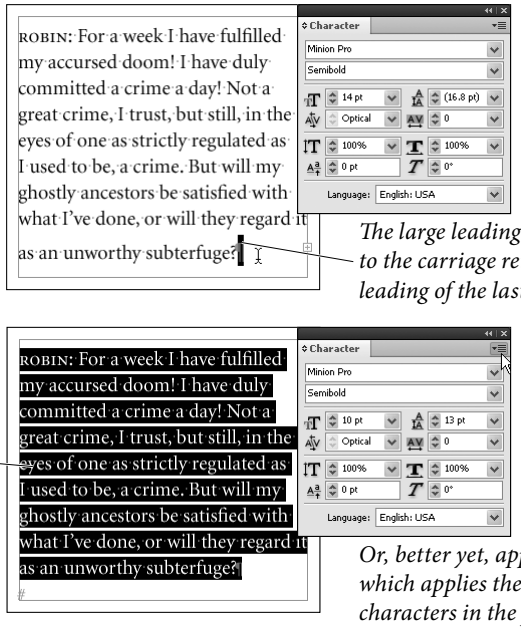


FIGURE 4-7
That Crazy Carriage Return

In this example, the carriage return character carries an Auto leading value and point size left over from previous paragraph formatting (the leading of the rest of the text in the paragraph is 13 points).

The large leading value applied to the carriage return distorts the leading of the last line of text.

To avoid this problem, select the entire paragraph before applying character formatting—this selects the carriage return character.

Or, better yet, apply a paragraph style, which applies the same leading to all characters in the paragraph.

Leading Techniques. Here are a few tips for adjusting leading.

- Increase leading as you increase line length (the column width). Solid leading (such as 12 point text on 12 points leading) produces almost unreadable text for all but the narrowest of lines.
- Use extra leading for sans serif or bold type.
- Fonts with a small x-height (the height of the lowercase "x" in relation to the height of the capital letters) can often use a smaller leading value than those with a large x-height.
- Decrease leading as point size increases. Large display or headline type needs less leading than body copy. You can often get by with solid leading or less—just make certain that the descenders of one line don't bump into the ascenders of the line below.

Kerning

The goal of kerning—the adjustment of the space between characters—is to achieve even spacing. InDesign offers both pair kerning (the adjustment of the space between adjacent characters) and tracking (or "range kerning")—the adjustment of all of the inter-character spaces in a series of characters.

For each space between any pair of characters in a publication, InDesign applies the total of the pair kerning and tracking values (so if you set kerning to 50 and tracking to –50, you will not see any change in the composition of the text).

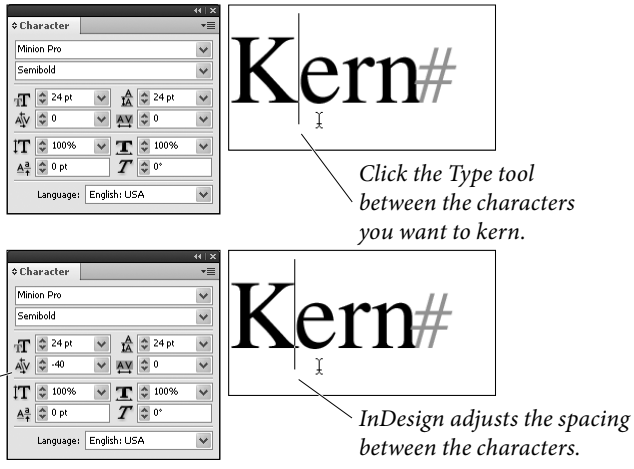
InDesign adjusts kerning using units equal to one-thousandth of an em. An *em* is equal in width to the size of the type—for instance, in 18 point text, an em is 18 points wide, and so each unit in the kerning or tracking fields equals $^{18}/_{1,000}$ point (about .00025 inch). You can enter values from –1000 (minus one em) to 10000 (plus 10 ems) in the Kerning and Tracking fields.

Manual Kerning

To adjust spacing between a pair of characters, move the text insertion point between the characters and apply manual kerning (see Figure 4-8). Use any of the following techniques.

- Enter a value in the Kerning field of the Character panel or Control panel. If the kerning field already contains a value entered by one of the automatic kerning methods (see below), you can replace the value by typing over it, or add to or subtract from it (by typing a "+" or "-" between the value and the amount you want to add or subtract).

FIGURE 4-8
Kerning Text



- Click the arrow buttons attached to the Kerning field. Click the up button to increase the kerning amount by the value you entered in the Kerning field in the Units & Increments Preferences dialog box, or click the down button to decrease kerning by the same amount.
- Press a keyboard shortcut (see Table 4-1).

To remove all kerning and tracking from the selected text, press Command-Option-Q/Ctrl-Alt-Q (this sets tracking to zero and sets the kerning method to Metrics).

You can't apply pair kerning when you have a range of text selected—if you try, InDesign displays an error message. When you want to apply a kerning value to a range of text, use Tracking.

Automatic Kerning

InDesign offers two automatic kerning methods: pair kerning based on kerning pairs found in the font itself (choose Metrics from the Kerning pop-up menu), and kerning based on the outlines of the characters (choose Optical). To see the difference between the two methods take a look at Figure 4-9.

- **Metrics.** When you turn on the Metrics automatic kerning method, InDesign reads the kerning pairs built into the font by the font's designer (or publisher). These kerning pairs cover—or attempt to cover—the most common letter combinations (in English, anyway), and there are usually about 128 pairs defined in a typical font.

  You'd think that using the kerning pairs defined in the font would be the perfect way to apply automatic kerning to your text. Who, after all, knows the spacing peculiarities of a given font

TABLE 4-1
Kerning Keyboard Shortcuts

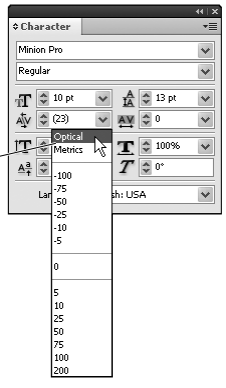
To change kerning by:	Press:
+20/1,000 em*	Option-Right arrow/ Alt-Right arrow
-20/1,000 em*	Option-Left arrow/Alt-Left arrow
+100/1,000 em**	Command-Option-Right arrow/ Ctrl-Alt-Right arrow
-100/1,000 em**	Command-Option-Left arrow/ Ctrl-Alt-Left arrow
Reset Kerning	Command-Option-Q/ Ctrl-Alt-Q

* This is the default value in the Kerning field of the Units & Increments Preferences dialog box.

** Or five times the default kerning amount.

FIGURE 4-9
Automatic Kerning Methods

Choose Optical or Metrics from the Kerning pop-up menu.



Automatic kerning using the Metric method.

Automatic kerning using the Optical method.

better than its designer? Would that this were true! In reality, very few fonts contain well-thought-out kerning pairs (often, pair kerning tables are simply *copied* from one font to another), and the number of kerning pairs defined per font is inadequate (a really well-kerned font might contain several *thousand* pairs, tweaked specifically for the characters in that typeface).

We really need a better method—a method that can adjust the spacing between *every* character pair, while taking into account the peculiarities of the character shapes for a particular font. We also need a kerning method that can automatically adjust the spacing between characters of different fonts. With InDesign's Optical kerning method, we get both.

- **Optical.** The Optical kerning method considers the composed shapes of the characters and applies kerning to even out spacing differences between characters.

In general, the kerning applied by InDesign when you use the Optical kerning method looks looser than that applied by the Metrics kerning method. That's okay—once you've accomplished even spacing, you can always track the text to tighten or loosen its overall appearance. Because tracking applies the same kerning value to all of the text in the selection, in addition to any pair kerning, the even spacing applied by the Optical kerning method is maintained.

Viewing Automatic Kerning Amounts. As you move your cursor through the text, you'll be able to see the kerning values applied to the text in the Kerning field of the Character panel or Control panel. Kerning values specified by Optical kerning or Metrics kerning are displayed surrounded by parentheses; manual kerning values you've entered are not (see Figure 4-10).

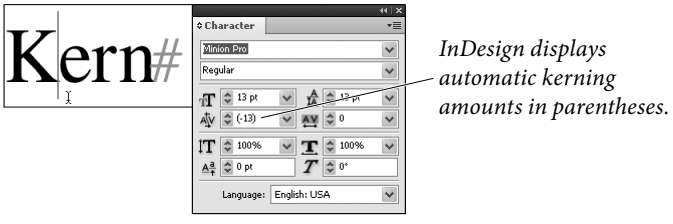


FIGURE 4-10
How You Can Tell It's Automatic Kerning

Changing Word Spacing. It's not entirely true that you can't apply kerning when more than one character is selected. You can select a range of text and select Metrics, Optical, or 0 (zero) from the pop-up menu attached to the Kerning field.

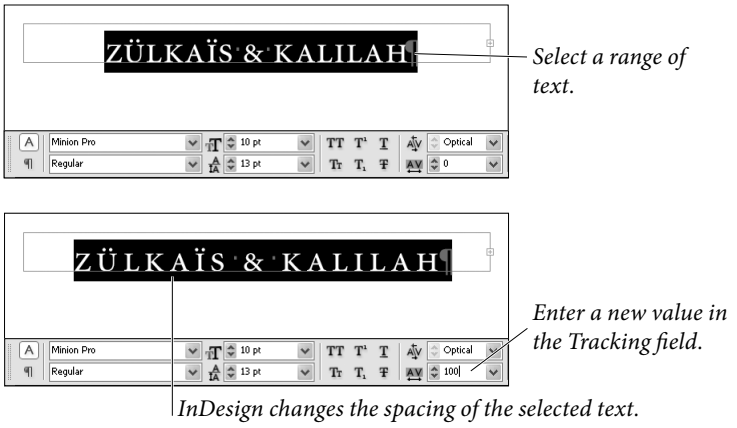
If you want to increase the spacing between words but don't want to change the letterspacing of a range of text, press Command-Option-\ or Ctrl-Alt-\ (backslash) to add the base kerning increment (as defined by the value in the Kerning field in the Units & Increments Preferences dialog box) after each space character in the range. Hold down Shift as you press this shortcut, and InDesign adds kerning by five times the base kerning amount. To decrease word spacing, press Command-Option-Delete/Ctrl-Alt-Backspace (add the Shift key to the shortcuts to multiply the effect by five).

This keystroke works simply by changing the kerning after each space character. You can always go back and change the kerning, or use Find/Change to remove it.

Tracking

Tracking, in InDesign, applies the same kerning value to every character in a selected range of text (see Figure 4-11). When you change the tracking of some text, InDesign applies the tracking in addition

FIGURE 4-11
Tracking



to any kerning values applied to the text (regardless of the method—manual or automatic—used to enter the pair kerning). Note that this is the same as the definition of tracking used by QuarkXPress, and is different from the definition used by PageMaker. In PageMaker, tracking also applies kerning, but the amount varies depending on the point size of the selected text and the tracking table in use. In PageMaker, InDesign's tracking would be called "range kerning."

Just as you cannot apply kerning using the Kerning field when you have multiple characters selected, you can't change the Tracking field when the text insertion point is between two characters—you have to have one or more characters selected. (Actually, you *can* change it, but it doesn't do anything.)

Note that the default keyboard shortcuts for tracking are exactly the same as those for kerning; which one you get depends on whether or not you have a range of text selected.

Tracking Tips. The following are a few of our favorite tracking tips.

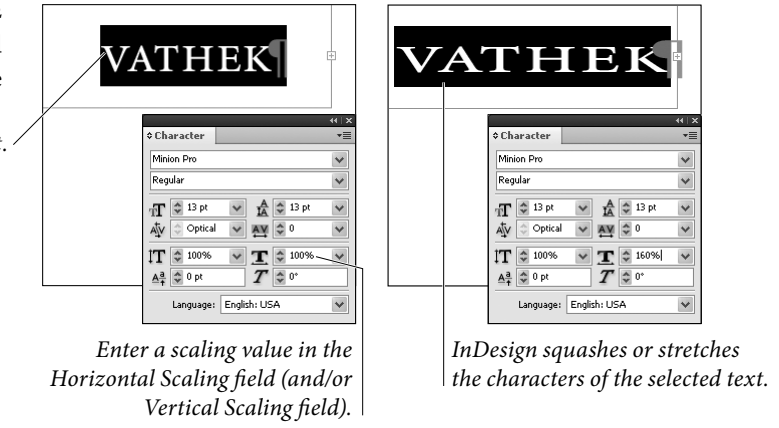
- If you're setting text in all capitals or the small caps style, add 20 or 50 units of tracking to the text. Do not add tracking to the last character of the last word in the text, as that will affect the amount of space after the word, too.
- Printing white text on a black background often requires a little extra tracking, too. That's because the negative (black) space makes the white characters seem closer together.
- Larger type needs to be tracked more tightly (with negative tracking values). Often, the larger the tighter, though there are aesthetic limits to this rule. Advertising headline copy will often be tracked until the characters just "kiss."

- A condensed typeface (such as Futura Condensed) can usually do with a little tighter tracking. Sometimes we'll apply a setting as small as -10 to a text block to make it hold together better.
- When you're setting justified text and you get bad line breaks, or if you have an extra word by itself at the end of a paragraph, you can track the whole paragraph plus or minus one or two units without it being too apparent. Sometimes that's just enough to fix these problems.

Horizontal and Vertical Scaling

Enter a value in the Horizontal Scaling field or the Vertical Scaling field (or both) to change the size of the selected text (see Figure 4-12). When the values you enter in these fields are not equal, you're creating fake "expanded" or "condensed" type. We say "fake" because true expanded or condensed characters must be drawn by a type designer—when you simply scale the type, the thick and thin strokes of the characters become distorted. Entering values in these fields does not affect the point size of the type.

FIGURE 4-12
Squashing and Stretching Type

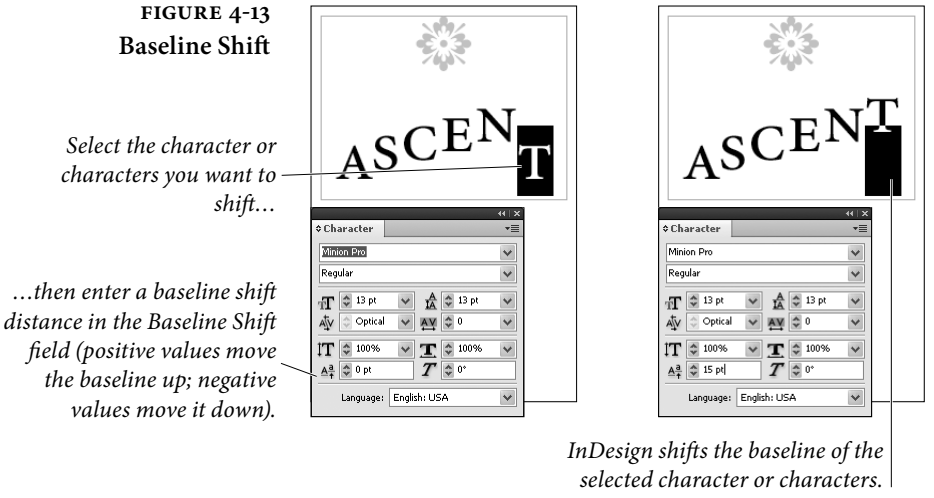


Baseline Shift

Sometimes, you need to raise the baseline of a character or characters above the baseline of the surrounding text (or lower it below the baseline). In pre-DTP typesetting, we would accomplish this by decreasing or increasing the leading applied to the character. However, that won't work in modern programs—remember, in InDesign the largest leading in the line predominates. Instead, use the Baseline Shift field in the Character panel or Control panel (see Figure 4-13).

Enter an amount in the Baseline Shift field to shift the baseline of the selected text by that amount. As you'd expect, positive values move the selected text up from the baseline; negative values move the selected text down from the baseline.

FIGURE 4-13
Baseline Shift



While it's tempting to use Baseline Shift to adjust numbers in formulae, registered trademark symbols, and so on, it's better to use the Superscript or Subscript features.

Baseline Shift Keyboard Shortcuts. To apply baseline shift using your keyboard, select some text and press Option-Shift-Up arrow/Alt-Shift-Up arrow to move the baseline of the text up two points—or whatever value you've entered in the Baseline Shift field of the Units & Increments Preferences dialog box, or Option-Shift-Down arrow/Alt-Shift-Down arrow to shift it down by the same distance.

To shift the baseline of the selected text *up* by a distance equal to five times the value you entered in the Units & Increments Preferences dialog box, press Command-Option-Shift-Up arrow/Ctrl-Alt-Shift-Up arrow. To shift the baseline down by the same amount, press Command-Option-Shift-Down arrow/Ctrl-Alt-Shift-Down arrow.

Skewing

When you apply skewing to a range of characters, InDesign slants the vertical axis of the type by the angle you enter here (see Figure 4-14). You can enter from –85 degrees to 85 degrees. Positive skew values slant the type to the right; negative values slant it to the left.

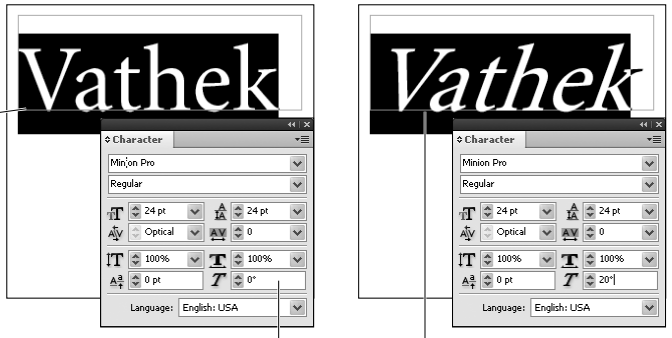
This might be useful as a special text effect, but you shouldn't count on it to provide an "italic" version of a font family that lacks a true italic type style. Why? Because there's more to an italic font than simple slanting of the characters (see Figure 4-15).

Language

The language you choose for a range of text determines the dictionary InDesign uses to hyphenate and check the spelling of the text (see Figure 4-16). Because language is a character-level attribute, you

FIGURE 4-14
Skewing Text

Select some text.



Enter a value in the Skew field.

InDesign skews the characters of the selected text.

FIGURE 4-15
Real and Fake Italic Characters

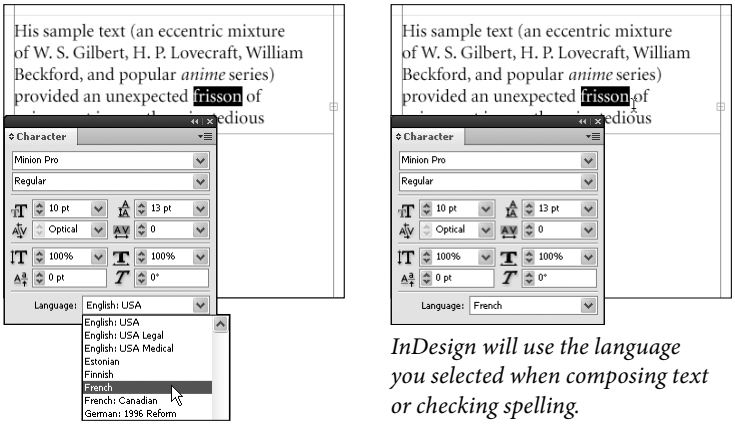
Note the differences in character shapes.

Real: Minion Pro Italic

Fake: Minion Pro Regular with 10 degree skewing.

FIGURE 4-16
Assigning a Language

Select a word or phrase, then select a language from the Language pop-up menu.



InDesign will use the language you selected when composing text or checking spelling.

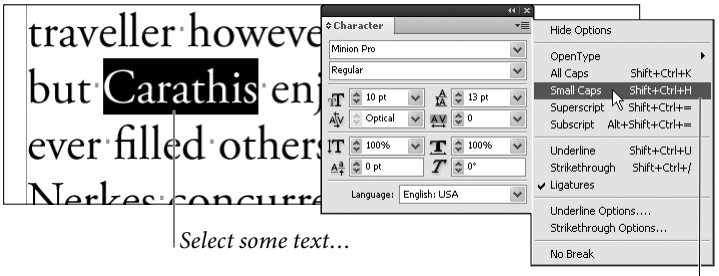
can apply a specific language to individual words—which means you can tell InDesign to stop flagging "frisson" or "gemütlichkeit" as misspelled words, if you want. The only languages that show up in the Language pop-up menu in the Character panel or Control panel are those for which you have a dictionary installed. If the language you're looking for isn't in this list, then you can use the InDesign installer to install that dictionary for you.

Case Options

You can change the case of selected characters to All Caps or Small Caps by choosing All Caps or Small Caps from the Character panel menu (see Figure 4-17). InDesign does not replace the characters

FIGURE 4-17
All Caps and Small Caps

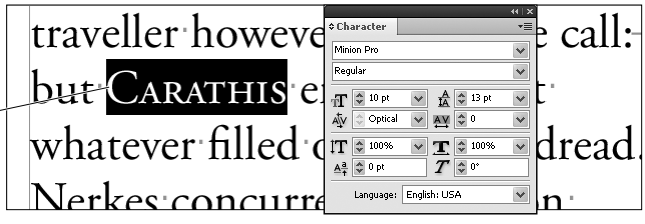
These two options work the same way; we'll demonstrate small caps.



Select some text…

…then choose Small Caps from the Character panel or Control panel menu

If you're using an OpenType font (as in this example), InDesign displays the small caps version of the selected characters (if the OpenType font contains small caps alternate characters).



If you're using a PostScript Type 1 or TrueType font, InDesign displays scaled, capitalized versions of the selected characters.

Adobe Garamond Pro (OpenType)
THESE ARE TRUE SMALL CAPS
Adobe Garamond (PostScript Type 1)
THESE ARE NOT TRUE SMALL CAPS

If you're using a PostScript Type 1 font, don't use the Small Caps character formatting option; instead, change the font of the text to an "expert set."

themselves; it simply changes they way they look and print. To InDesign's spelling checker or Find and Change features, the text is exactly as it was entered—not the way it appears on your screen.

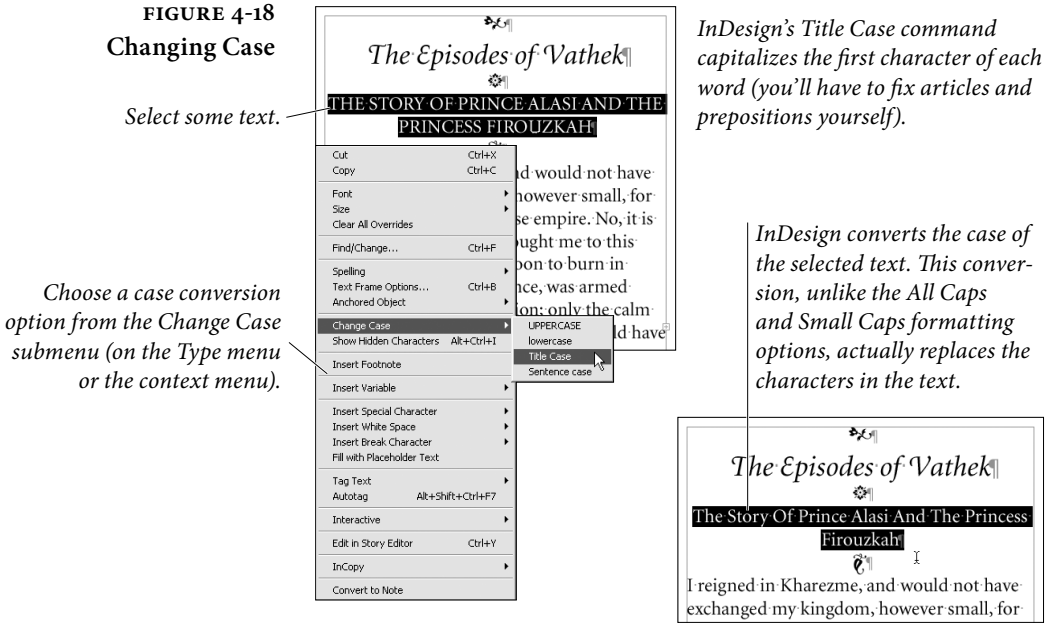
When you choose Small Caps from the Character panel menu (or press Command-Shift-H/Ctrl-Shift-H), InDesign examines the font used to format the selected text. If the font is an OpenType font, and if the font contains a set of true small caps characters, InDesign uses true small caps. InDesign is also smart enough to do this if you have a non-OpenType font that has an "Expert" version. If the font is not an OpenType font, doesn't have an Expert font available, or doesn't contain small caps characters, InDesign scales regular uppercase characters down to 70 percent (or whatever value you entered in the Small Cap field of the Type pane of the Preferences dialog box, as described in Chapter 1, "Workspace").

Changing Case

In addition to being able to temporarily change the case of characters using the case options, you can have InDesign change the case of the characters by typing new characters for you using the Change Case submenu (which you'll find on the Type menu and on the context menu when text is selected).

To change the case of selected characters, choose an option: Uppercase, Lowercase, Title Case, or Sentence Case. Uppercase and Lowercase are self-explanatory. Sentence Case capitalizes the first letter of each sentence. Title Case is very simpleminded: it capitalizes the first character of each word in the selection, even if the word is "the," "and," or another preposition or article (see Figure 4-18).

FIGURE 4-18
Changing Case



Underline

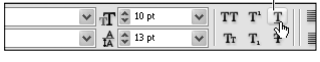
When you choose Underline from the Character panel menu, click the Underline button in the Control panel, or press Command-Shift-U/Ctrl-Shift-U, InDesign applies an underline to the selected text (see Figure 4-19).

To customize the underline, select Underline Options from the Character panel menu or the Control panel menu to display the Underline Options dialog box, where you'll find controls for setting the thickness, offset, color, and stroke style of the underscore. You can't save these settings as a style or preset, but you can build them into the definition of a character style.

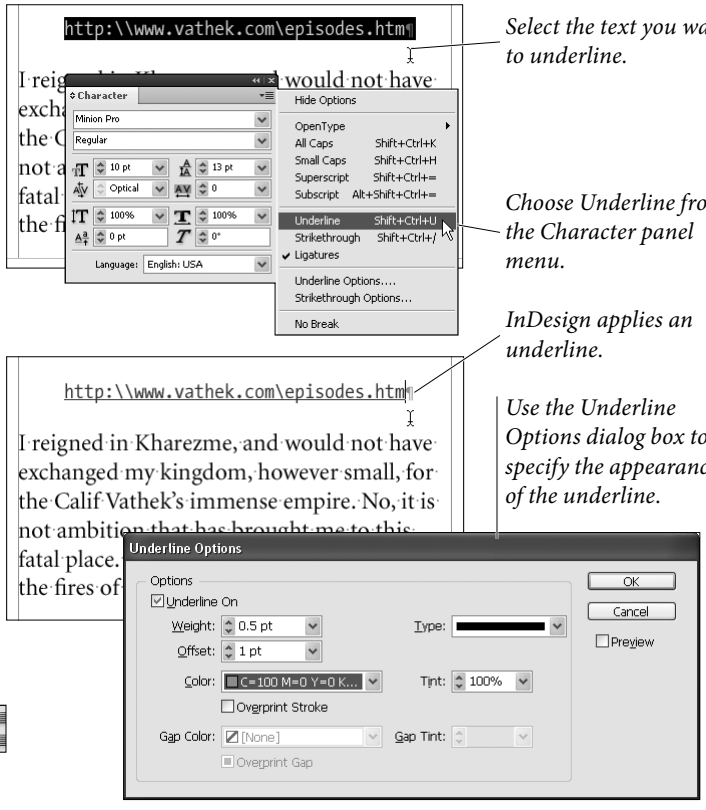
Breaking at Spaces. InDesign's underline also includes any spaces in the selection. Some designs require that underlines break at spaces in the text. You could laboriously select each space and turn off the underline attribute, by why not use Find/Change to do the work for you? Find a space in the selection with the Underline attribute, then replace it with a space with Underline turned off.

FIGURE 4-19
Underline

By default, stroke weights are based on the size of the text.



Here's a quick way to display the Underline Options dialog box: hold down Option/Alt as you click the Underline button on the Control panel.

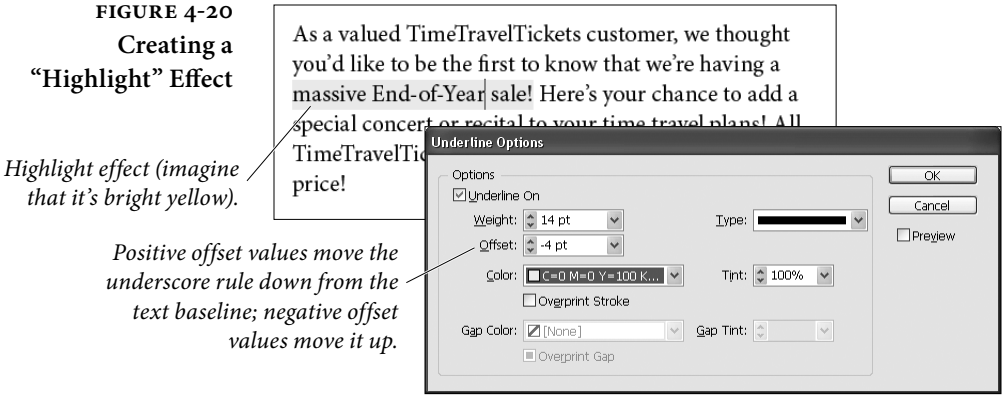


Breaking Underlines at Descenders. We said that there was no way to break underlines at descenders—but there is an inelegant workaround: apply a white stroke to the characters. The stroke will overlap the underline. You can use Find/Change to search for characters with descenders (such as the "j" or the "y") and use the Format button in the Change To area to give them a stroke.

Highlighting Text. Want to make some text look as if it's been highlighted with a felt "highlight" marker? You can simulate the effect using a custom underline (see Figure 4-20). Make your underline larger than the text it's supposed to cover and apply a negative offset so that it moves up to cover the text. Be sure to change the color of the underscore to yellow or pink or something that will contrast with the text its highlighting. Note that the color actually falls behind the text, but the effect will be as though the highlight was drawn over it.

You can also create interesting highlight effects by mixing a custom underline with a custom strikethrough. For instance, you could make a line appear above and below some text, sort of like putting the text in a stripe.

FIGURE 4-20
Creating a "Highlight" Effect



Highlight effect (imagine that it's bright yellow).

Positive offset values move the underscore rule down from the text baseline; negative offset values move it up.

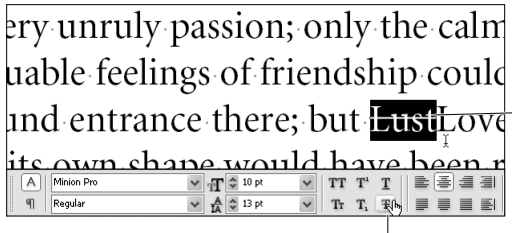
Strikethrough

When you choose Strikethrough from the Character panel menu (or click the Strikethrough button in the Control panel or press Command-Shift-?/Ctrl-Shift-?), InDesign applies the strikethrough text effect to the selected text (see Figure 4-21). To remove the Strikethrough text effect, select the feature or press the keystroke again.

The strikethrough style isn't particularly consistent; it changes its thickness and distance from the baseline depending on the font. However, you can control the strikethrough style by selecting Strikethrough Options from the Character or Control panel menu. The options here are very similar to those in the Underline Options dialog box: You can adjust the thickness, color, offset (from the baseline), and style of the line. If you're applying a colored strikethrough

FIGURE 4-21
Strikethrough

By default, the stroke weight of the Strikethrough effect varies based on the size of the text.

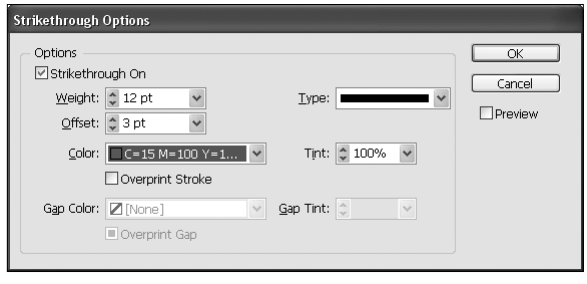


Select some text…

…then choose Strikethrough from the Character panel menu or Option/Alt-click the Strikethrough button on the Control panel.

You can use the Strikethrough Options dialog box to specify the appearance and position of the strikethrough rule.

To display the Strikethrough Options dialog box, hold down Option/Alt as you click the Strikethrough button in the Control panel, or choose Strikethrough Options from the Control panel menu.



on top of black text, you may want to set it to overprint so that it won't knock out a fine white line—which would be difficult to register on press. If so, make sure you like the result by turning on Overprint Preview (from the View menu).

Ligatures

Some character combinations are just trouble—from a typesetting standpoint, at least. In particular, when you combine the lowercase "f" character with "f," "i," or "l," the tops of the characters run into each other. To compensate for this, type designers usually provide ligatures—special characters in the font that are "tied" ("ligature" means "tie") together.

When you choose Ligatures from the Character panel's menu, InDesign replaces some of the character combinations in the selected range of text with the corresponding ligatures (see Figure 4-22).

If the font you've selected is not an OpenType font, InDesign replaces only the "fl" and "fi" character combinations. In Windows, InDesign uses these ligature characters if they're available in the font (and they are, for most PostScript Type 1 fonts), even though they are not part of the Windows character set—that is, there is usually no way to type them. If the font you've selected is an OpenType font, InDesign makes the ligature substitutions are suggested by the font.

OpenType fonts can also feature other sorts of ligatures—for more on this topic, see "OpenType Fonts," later in this chapter.

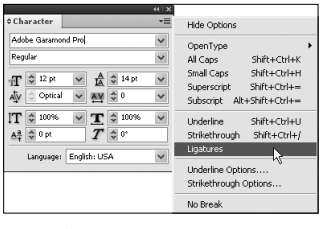
Superscript and Subscript

While you can always create superscript or subscript characters (for use in fractions or exponential notation) by changing the point size and baseline shift of selected characters, InDesign provides a shortcut: the Superscript and Subscript text effects (see Figure 4-23).

When you select Superscript or Subscript from the Character panel menu, InDesign scales the selected text and shifts its baseline. (You can also press Command-Shift-=/Ctrl-Shift-= for superscript or

FIGURE 4-22
Ligatures

Select some text and then choose Ligatures from the Character panel menu.



If you're using an OpenType font, InDesign uses additional ligatures defined in the font. In this example, InDesign applies the "ffi" and "ffl" ligatures.

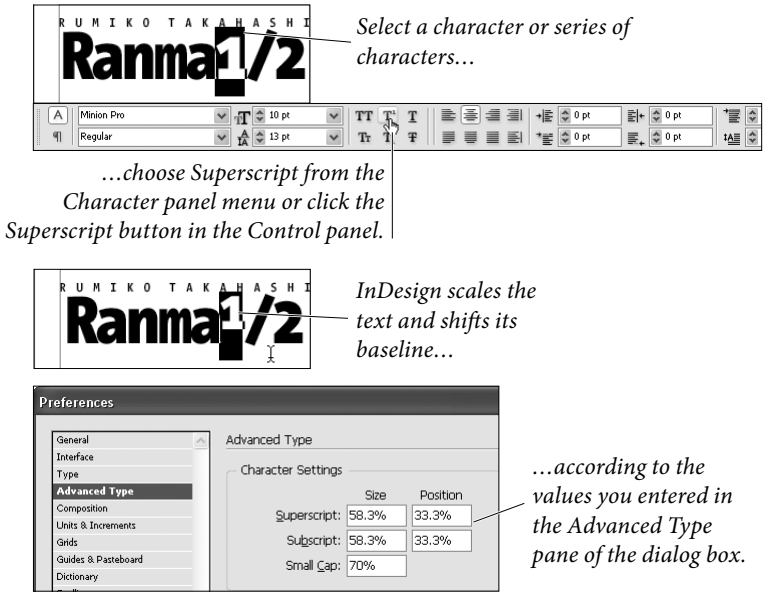
Ligatures off
Adobe Garamond Pro (OpenType)
file difficult reflect affliction

Adobe Garamond (PostScript Type 1)
file difficult reflect affliction

Ligatures on
Adobe Garamond Pro (OpenType)
file difficult reflect affliction

Adobe Garamond (PostScript Type 1)
file difficult reflect affliction

FIGURE 4-23
Superscript and Subscript



Tip: To display the Advanced Type pane of the Preferences dialog box, hold down Option/Alt and click the Superscript or Subscript button in the Control panel.

Command-Option-Shift-=/Ctrl-Alt-Shift-= for subscript.) InDesign calculates the scaling and baseline shift by multiplying the current text size and leading by the values you've set in the Size fields in the Advanced Type pane of the Preferences dialog box (see "Text Preferences" in Chapter 1, "Workspace").

If you are using an OpenType font that has true Superscript and Subscript characters, use Superscript/Superior and Subscript/Inferior options in the OpenType submenu (see below).

No Break This one is really easy to explain: To prevent a range of text from breaking across lines, select the text and turn on the No Break option in the Character or Control panel menu.

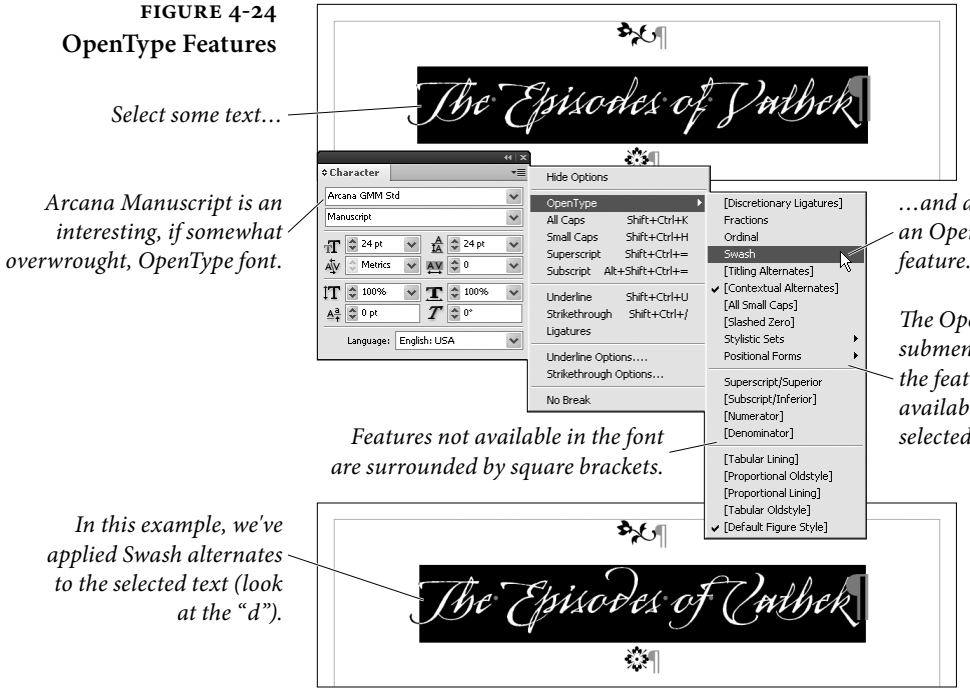
OpenType Fonts

We've mentioned OpenType fonts a few times in the chapter so far; however, we should probably take a moment to discuss them. The OpenType font specification was created jointly by Microsoft and Adobe as a way to represent a font with only a single file on both Macintosh and Windows (so you can move the font cross-platform). The characters are encoded using the international standard Unicode, so each font can have hundreds, or even thousands of different characters—even the very large character sets in non-Roman languages such as Japanese.

InDesign can perform special tricks with OpenType fonts, such as replacing characters with swashes, or adding ligatures for character pairs such as ct and ffi.

Most of the special OpenType typesetting features in InDesign are hidden in the OpenType submenu in the Character or Control panel's menu (see Figure 4-24). If a font doesn't support one of these features, it appears in the menu within square brackets ("[Swash]").

FIGURE 4-24
OpenType Features



Alternate Characters

The OpenType features work by replacing one or more glyphs with another single glyph. "fi" and "fl" ligatures that we discussed earlier are a great example of this, but they're only the beginning.

Discretionary Ligatures. Font designers love making ligatures, but they recognize that users won't want to use more esoteric ligatures (such as "ct" or "st") in everyday text. If you select some text and turn on the Discretionary Ligatures feature, InDesign uses these lesser-known ligatures (if they're available in the font). We usually turn this off except when we're trying to make something look "old fashioned," or when using a script typeface (such as Bickham Script Pro).

Fractions. Changing fake fractions (such as 1/2) to real fractions (½) has long been a thorn in the side of anyone laying out cookbooks

or construction manuals. Fortunately, you can now just turn on the Fractions feature and anything that looks like a fraction will convert to the proper character automatically.

In some OpenType typefaces, only very basic fractions such as ½ and ¼ are converted. Other typefaces support those plus some extended fractions, such as ⅔ and ⅝. Some fonts support arbitrary fractions such as $^{355}/_{113}$. It depends on the design of the font.

Don't turn on the Fractions feature for all your text because InDesign often assumes that *all* your numbers and much of your punctuation are part of fractions and turns them into numerators.

Ordinal. "First," "second," and "third" are all examples of ordinal numbers. InDesign can automatically set the "st", "nd", and "rd" (or the "o" and "a" in Spanish) to superscript when you turn Ordinal on in the OpenType submenu. "3rd," for example, becomes "3rd".

Swash. When you need to give a character a little more flair, select it and turn on the Swash feature. Swashes are typically used at the beginning or ending of words or sentences. You can see if a particular OpenType font has any swash characters by opening the Glyph panel and looking for Swash in the Show pop-up menu; some fonts (such as Adobe Caslon Pro) have swashes in their italic styles only.

Titling Alternates. Some OpenType fonts have special "titling" characters that are designed for all-uppercase type set at large sizes.

Contextual Alternates. Some OpenType fonts—mostly the script faces—have contextual ligatures and connecting alternates, which are very similar to ligatures. When you turn on Contextual Alternates, the result looks more like handwriting because the alternate characters connect to each other.

All Small Caps. When you turn on the Small Caps feature (which we described in "Case Options," earlier), InDesign leaves uppercase characters alone. All Small Caps, however, forces uppercase characters to appear as lowercase small caps. This is useful when formatting acronyms such as DOS, NASA, or IBM.

Slashed Zero. The problem with the number 0 is that it looks far too much like the letter O in some fonts. Some folks like to differentiate the two by using a slashed zero (0) in place of a zero. When you apply the Slashed Zero OpenType style, every zero appears with a slash automatically.

Stylistic Sets. A few fonts go beyond offering a swash or contextual alternate here and there, and provide whole sets of alternates that each give a slightly different feel to the face as a whole. For example, you might like Thomas Phinney's Hypatia Sans Pro, but realize that you don't like the font's double-loop "g". No problem: Turn on stylistic set number four and the character changes throughout the selection (see Figure 4-25). You can enable more than one stylistic set at a time; select it once to turn it on, select it again to turn it off.

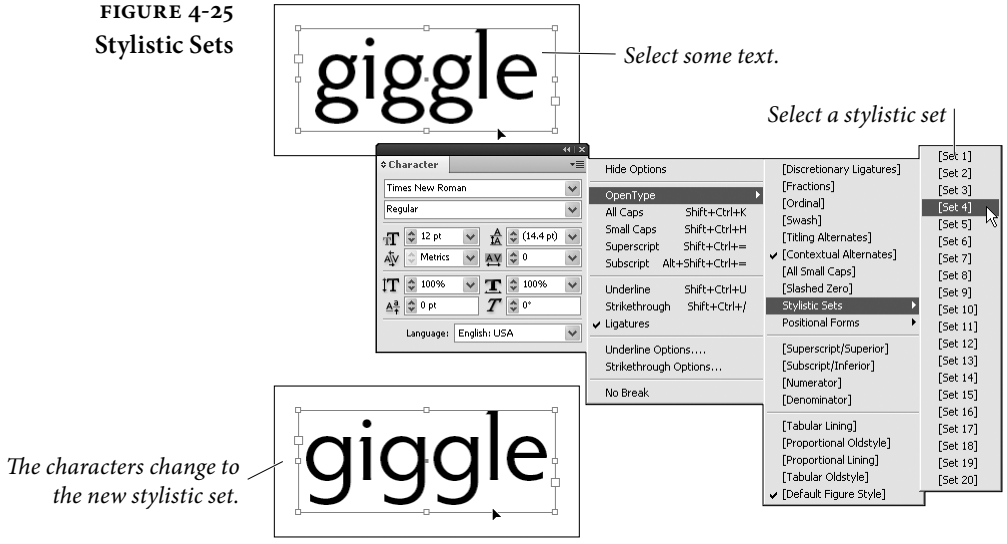


FIGURE 4-25
Stylistic Sets

Positional Forms. In some languages, characters change depending on their position in a word—for example, in Hebrew, the "mem" character changes from מ to ם when its at the end of a word.

InDesign uses the General positional form—which uses the normal glyph. If you choose Automatic Form, InDesign changes the character depending on its position in the word. You can override the form by choosing Initial, Medial, Final, or Isolated Form. It's hard to find a font in which this feature does much of anything.

Raised and Lowered Characters

Typesetting a treatise on Einstein's theory of relativity? If so, you'll be mighty happy about InDesign's ability to use true superscripts and subscripts instead of the faked scaled versions that you get with the Superscript and Subscript features in the Character panel's menu. You have four choices in the OpenType submenu (each one is mutually exclusive of the others):

- Superscript/Superior
- Subscript/Inferior

- Numerator
- Denominator

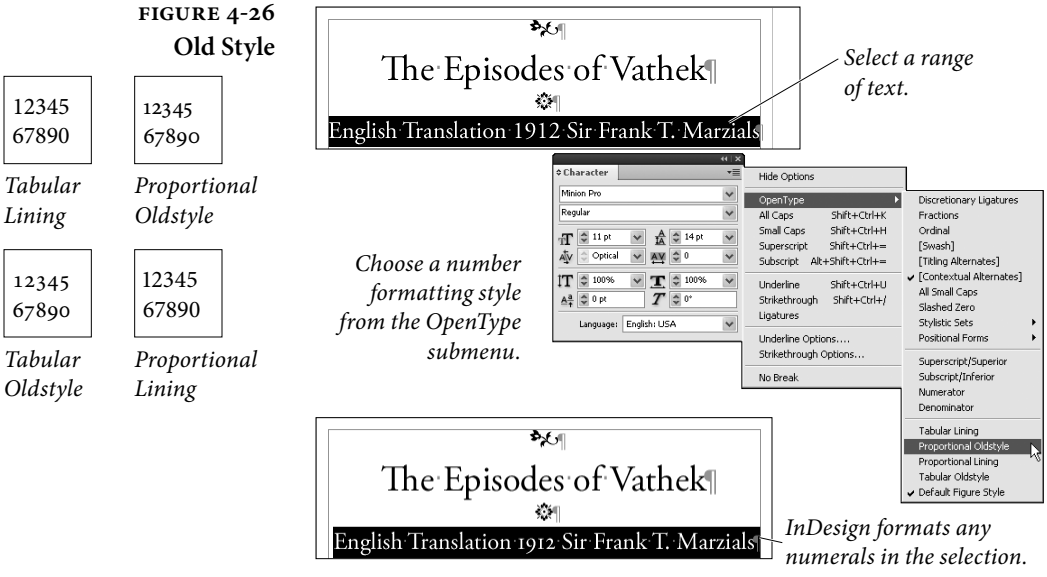
However, note that most OpenType fonts only have a small set of characters designed to be superscript or subscript, so you can't set any and all characters you want in these styles. For example, if you set the word "turkey" to Superscript/Superior style, only every other character changes. In some cases you'll get the same result when you choose Denominator or Subscript/Inferior.

Formatting Numerals

We like "old style" numerals (you know, the kind with descenders: 1234567890) better than full-height "lining figures" (1234567890), and we've always gotten them by changing the font of the characters to an "expert" version of whatever font we were using (if one was available). So we were very happy to see that there are four different ways InDesign can format numerals: Proportional Oldstyle, Tabular Oldstyle, Proportional Lining, Tabular Lining (see Figure 4-26).

Tabular Lining works well for financial tables (such as those found in an annual report), because numbers have equal widths and align from one line to the next. If you choose Tabular Oldstyle from the OpenType submenu, the numerals line up, but InDesign uses old style characters. Proportional Lining numerals are all the same height, but vary in width. David prefers this style for everything other than tables, especially when interspersing numbers and uppercase characters. Ole would rather use Proportional Oldstyle, which uses old style figures of varying widths.

FIGURE 4-26
Old Style



The last OpenType numeral formatting option is Default Figure Style, which applies the figure style defined as the default by the type designer (so the effect varies from font to font).

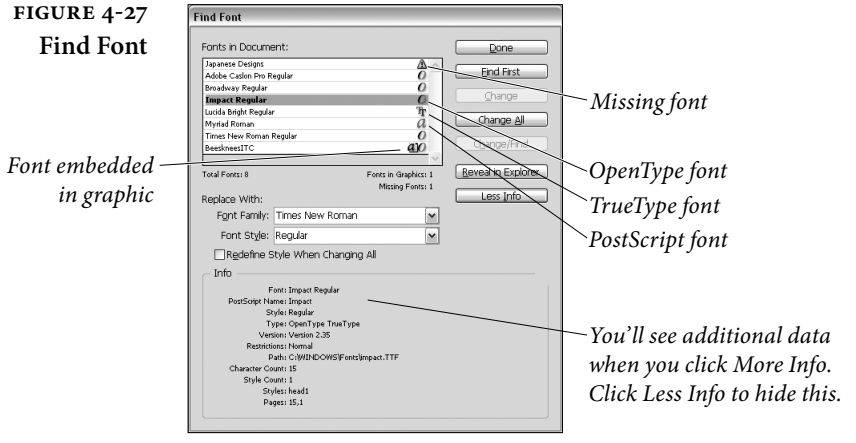
Find Font

The Find Font dialog box (choose Find Font from the Type menu) displays a list of every font that appears somewhere on a document page—including on master pages and in linked PDF or EPS graphics (see Figure 4-27). It does not list fonts that are defined in paragraph or character styles that aren't actually applied to text. If you click the More Info button, the dialog box displays more information about each font you select, including the pages where the font is used, which styles include this font, how many text characters appear in this font, and the version of the font. (There is often more than one version of the same font, each with its own number, just like other software.) Note that showing More Info can slow down the Find Font dialog box significantly, so we often leave this closed.

If you're not sure where a font is living on your hard drive, the Find Font dialog comes to the rescue: Not only is the path to the font listed in More Info, but you can click Reveal in Finder (or Reveal in Explorer in Windows) to open the folder that contains the font.

Replacing Fonts. It's a good idea to visit Find Font every now and again, and especially before finishing your job. We often find rogue fonts sneaking in to documents when we import or copy and paste text from Word or some other document. For example, as we type this, we checked and found that Times New Roman is in this document

FIGURE 4-27
Find Font



for some reason. More Info tells us that it's applied to 36 characters on two different pages. Fortunately, the rest of the Find Font dialog box acts like the Find/Change dialog box, so we can quickly rid ourselves of this aberration.

To replace that incorrectly-styled text, select the font from the list and click Change, Change All, or Change/Find.

If you believe the errant font is actually inside a character or paragraph style definition, then turn on the Redefine Style When Changing All option *before* you click Change All. Otherwise, you'll change the font on your pages, but the font will still be lurking inside the style, just waiting to surprise you again when you least expect it.

By the way, sometimes you'll find that Find Font lists a font as being used in your document but Find Next won't find it, and More Info tells you that there are zero characters that have this font applied to it. This happens when the font is applied only to automatic bullets or numbering (see "Bullets and Numbering," later in this chapter). Find Font will also tell you a font exists when it really doesn't if you have an empty frame that used to contain text in that font—just another good reason not to leave empty frames lying around.

Filling and Stroking Characters

InDesign can fill or stroke text as it can any other path. Once you've selected text, you can set the fill color, stroke color, stroke weight, stroke type, and stroke alignment (see Figure 4-28). The Control panel includes Fill and Stroke boxes for easy color swatch selection.

You can apply gradients to the fill and stroke of the type without converting the type to outlines. However, while gradients are easy to apply, it's not always easy to get the effect you're looking for, because gradients are based on the bounds of the text frame. If you want to change the gradient, select the text and drag the Gradient Swatch tool over it. (See Chapter 5, "Drawing," for more on gradients.)

Paragraph Formatting

What makes a paragraph a paragraph? InDesign's definition is simple—a paragraph is any string of characters that ends with a carriage return. When you apply paragraph formatting, the formatting applies to all of the characters in the paragraph. Paragraph alignment, indents, tabs, spacing, and hyphenation settings are all examples of paragraph formatting.

FIGURE 4-28
Character Fill and Stroke

Select an unlinked text frame using the Selection tool, then click the Formatting Affects Text button.

You can also click the Formatting Affects Text button in the Swatches panel.

You can also select characters using the Type tool, then apply a fill and/or stroke to the text using the same controls you use to apply a fill or stroke to any path.

Format the text using any of the fill and stroke formatting tools. In this example, we used the Swatches panel to apply a tint to the fill and stroke of the text, and then used the Stroke panel to set the stroke weight.

You can control the stroke alignment of the stroke. This stroke is center aligned; the one to the right is aligned to the outside of the stroke.

Note that the fill retains the shape of the character as you increase stroke weight. This works because InDesign strokes the characters and then fills them.

You don't have to select all of the text in a paragraph to apply paragraph formatting—all you need to do is click the Type tool in the paragraph. To select more than one paragraph, drag the cursor through the paragraphs you want to format. The selection doesn't have to include all of the text, it only has to *touch* each paragraph.

If what you're trying to do, however, is apply character formatting (such as font or point size) to all of the characters in the paragraph, you should quadruple-click (or triple-click, if you've turned off the Triple Click to Select a Line option in the Type panel of the Preferences dialog box) the paragraph with the Type tool—that way, you'll select all of the characters, including the carriage return character. (Note that you can force a line break without creating a new paragraph—called a "soft return"—by typing Shift-Return/Shift-Enter.)

You can find all of InDesign's paragraph formatting features in the Paragraph panel. To display the Paragraph panel, press Command-Option-T/Ctrl-Alt-T. These features are duplicated in the Control panel—if the Control panel is displaying character formatting, then click the panel's Paragraph Formatting Controls button or press Command-Option-7/Ctrl-Alt-7 to switch to paragraph formatting.

Alignment Click the alignment buttons at the top of the Paragraph panel or in the Control panel to set the alignment of the selected paragraphs (see Figure 4-29).

InDesign supports the usual set of paragraph alignments—left aligned (also known as "rag right"), right aligned (also known as "rag left"), centered, and justified, but also adds a couple of variations on the justified alignment you might not be familiar with.

In addition to the standard "justified" alignment, which treats the last line of the paragraph as if it were left aligned, InDesign offers the force justified, right justified, and center justified alignments. These each tell InDesign to treat the last line of the paragraph differently. When you force justify the text, the last line is spread out all the way to the right margin, even if it's only a single word. In some cases, when the Paragraph Composer is turned on (see "Multi-line Composition," later in this chapter), turning on force justify actually reflows the paragraph significantly.

Right justified and center justified treat the last line as right aligned and center aligned, respectively. In the old days of typesetting, these alignments were known as "quad right" and "quad center."

Finally, the Align Towards Spine and Align Away from Spine options. The former aligns the text to the spine and leaves the outside of the text ragged; the latter does the opposite.

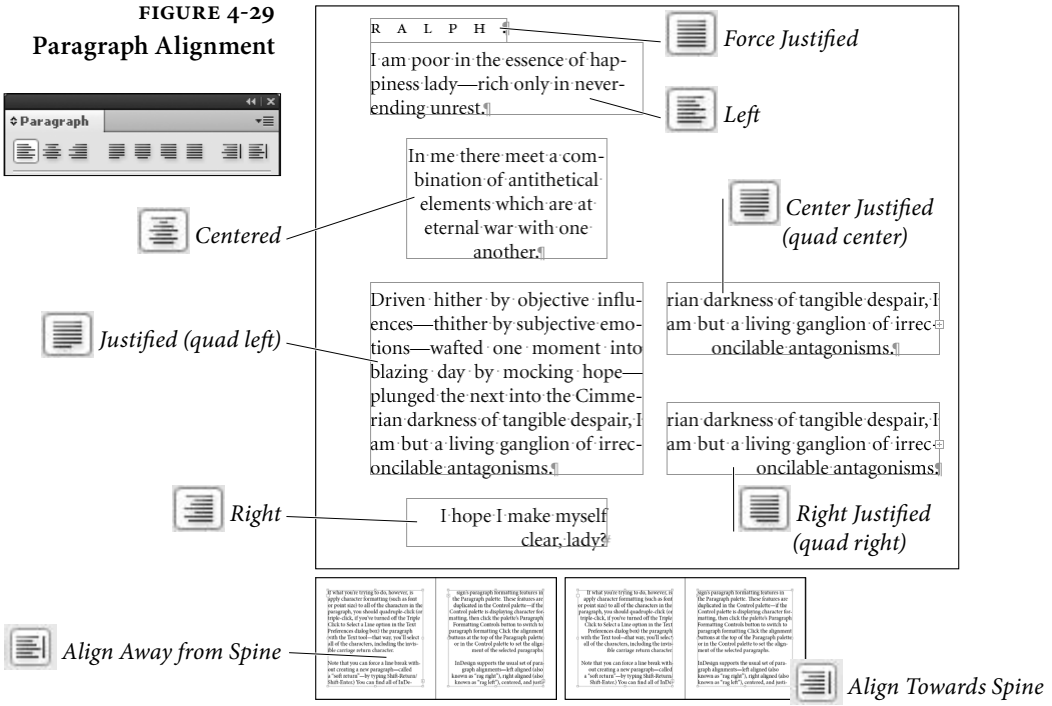


FIGURE 4-29
Paragraph Alignment

Indents

Paragraphs can be indented using the Left Indent and Right Indent fields in the Paragraph or Control panel (see Figure 4-30). You can enter values from zero (0) to 720 picas in these fields, but you can't enter negative numbers to make the edges of the paragraph "hang" outside the edges of the column or text frame.

Note that the left and right indents are always added to the text inset, as specified in the Text Frame Options dialog box. If you have a left inset of 6 points and a left indent of 12 points, then the left edge of the paragraph will sit 18 points from the edge of the frame.

There are also two special indents, called First Line Left Indent and Last Line Right Indent. The first applies to the first line of the paragraph alone—the value you enter in the First Line Left Indent field sets the distance between the first line indent and the left indent. The First Line indent may be positive or negative, but cannot be a negative number greater than the left indent (see Figure 4-31). You should *never* create an indent by typing five spaces at the beginning of a paragraph to indent; instead, use First Line indent.

How large your First Line indent should be depends on your design and on the typeface you're working with. Typically, the larger the x-height of the font, the larger first-line indent you should use. Book designers often use a one- or two-em indent, so in an 11-point type, the indent might be 11 or 22 points.

The Last Line Right Indent lets you set the position for the last line of text in a paragraph. The most common use for this is to apply a large Right Indent and then a negative Last Line Right Indent (so that the last line sticks out past the rest of the paragraph, as in many

FIGURE 4-30
Paragraph Indents

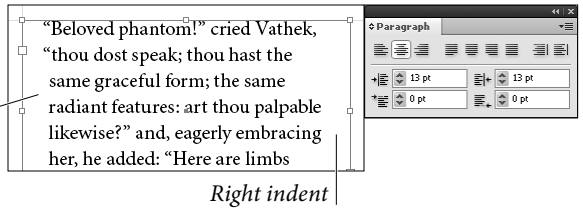
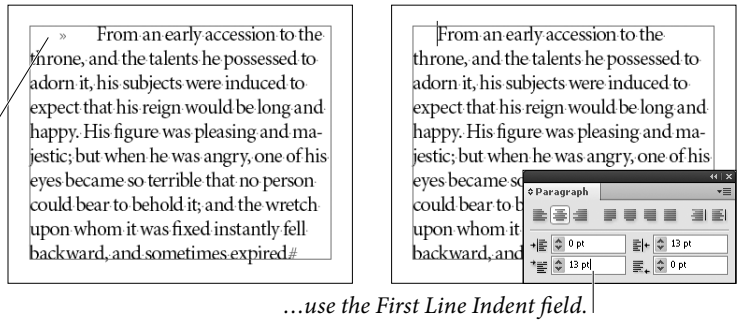


FIGURE 4-31
First Line Indent



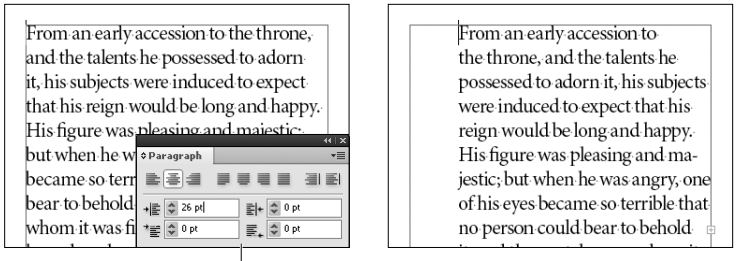
menu designs). Another use might be to set the position of the final line when using Justify All Lines (forced justification).

To change an indent value, select a paragraph and then do one of the following things:

- Display the Paragraph or Control panel, then enter a value in the First Line Left Indent, Left Indent, Right Indent, and/or the Last Line Right Indent fields (see Figure 4-32).
- Display the Tabs panel (press Command-Shift-T/Ctrl-Shift-T), and drag one of the indent icons (see Figure 4-33).

FIGURE 4-32
Setting an Indent

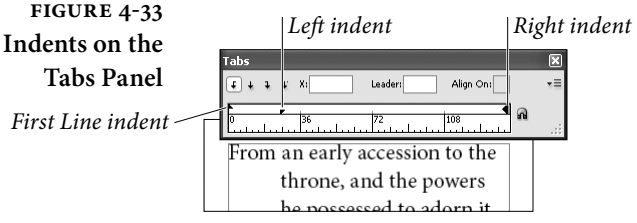
Click the Type tool in the paragraph you want to format.



Enter values in the Left, Right, First, or Last fields.

InDesign applies the indents you've specified.

FIGURE 4-33
Indents on the Tabs Panel



Creating a Hanging Indent

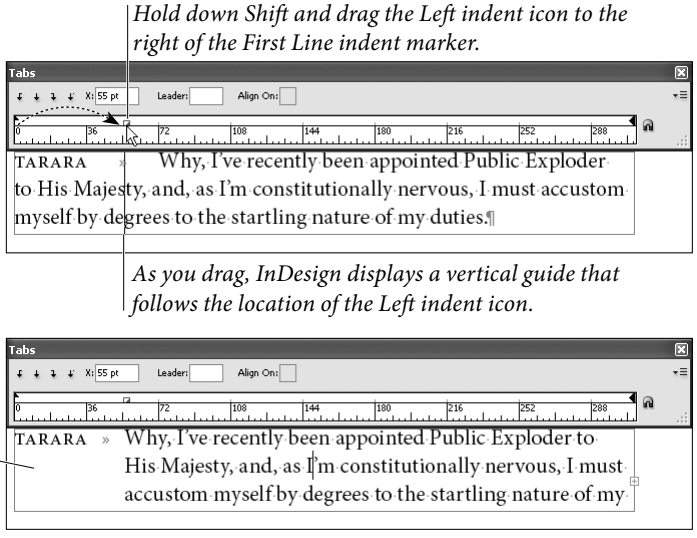
A hanging indent is one in which the first line of a paragraph "sticks out" to the left of the rest of the paragraph—often used in numbered or bulleted lists. Use hanging indents, rather than breaking and indenting each line using carriage returns and tabs—you'll thank yourself for it later, when you need to edit the text or change the width of the text block.

There are two basic methods for creating a hanging indent. First, you can apply a positive Left Indent and a negative First Line Left Indent with either the Tabs panel (see Figure 4-34) or the Paragraph or Control panel. Either way, there's no need to set a tab stop because InDesign assumes the left indent is the first tab stop.

Here's another way to create a hanging indent: Type the text you want to "hang," followed by a tab character. With the text cursor immediately after the tab character, press Command-\ or Ctrl-\ (backslash). This is the keyboard shortcut for the Indent to Here

FIGURE 4-34
Setting a Hanging Indent

Click the Type tool in a paragraph, then press Command-Shift-T/ Ctrl-Shift-T to display the Tabs panel.



character (you can also get this character from the Other submenu in the Insert Special Character submenu, in either the Type menu or the context menu). This invisible character causes the rest of the lines in a paragraph to indent to this place. If you want to delete it, you can place the cursor after it (since it's invisible and has no width, you might have to use the arrow keys to position it) and then press Delete.

While the Indent to Here character is easy to type, we like using the negative First Line indent trick more because we can use it in a paragraph style.

Tabs

Tabs come to desktop typesetting from typewriters, by way of word processing (with a stopover along the way at the Linotype machine). They solve a problem that didn't exist in hand-set metal type—namely, how do you position characters at precise locations in a line of type when you can't simply slide them into place with your finger?

There are two methods of controlling the horizontal position of text in a line. First, you can use space characters—word spaces, thin spaces, en spaces, and em spaces. This method places characters at *relative* positions in the line—where they appear depends on the width of the spaces and of the other characters in the line. Tabs, by contrast, provide *absolute* position on the line—a tab stop set at 6 picas will remain at that position, regardless of the content of the line.

Before we go any further, we'd better make sure we're using the same terminology. *Tab stops* are formatting attributes of paragraphs. *Tab characters* are what InDesign enters in a line of text when you press the Tab key. Tab characters push text around in a line; tab stops determine the effect of the tab characters. Each tab stop has

a position (relative to the left edge of the text frame), an alignment (which specifies the composition of the text following a tab character), and, potentially, a leader (a tab leader is a series of repeated characters spanning the distance from beginning of the tab character to the beginning of the following text). Put tab stops and tab characters together, and you get *tabs*, the feature.

A Little Tab Dogma. Look. We try to be reasonable. We try not to insist that everyone work the way that we do, or that our way of doing things is necessarily the best way (in fact, we sometimes know it's not). But tabs are different—if you don't do it our way, you'll be causing yourself needless pain. Let's review the rules:

- Use tabs, not spaces, to move text to a specific position in a line.
- Use a First Line indent, not a tab, when you want to indent the first line of a paragraph.
- Do not force lines to break by entering tab characters (or multiple tab characters) at the end of a line! If you do, you'll find tab characters creeping back into the text as editing changes force text recomposition. To break a line without entering a carriage return, use the "soft return" (press Shift-Return/Shift-Enter).
- Don't use multiple tab characters when you can use a single tab character and an appropriately positioned tab stop. While there are some cases where you'll have to break this rule, putting two or more tab characters in a row should be the exception.

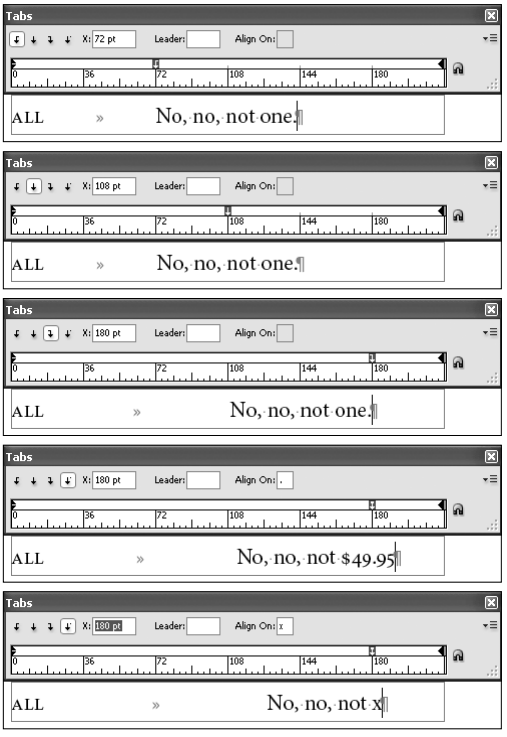
Types of Tab Stops

InDesign features four types of tab stops (see Figure 4-35).

Left, Right, and Centered Tab Stops. InDesign's left, right, and centered tab stops are the same as the basic tab stops you'll find in any word processor.

- Left tab stops push text following a tab character to a specific horizontal location in a column, and then align the text to the left of the tab stop position.
- Right tab stops push text to a location and then align the text to the right of the tab stop position.
- Centered tab stops center a line of text at the point at which you've set the tab stop.

FIGURE 4-35
Tab Stop Alignment



Decimal Tab Stops. Decimal tab stops push text following a tab character so that any decimal point you've entered in the text aligns with the point at which you set the tab stop.

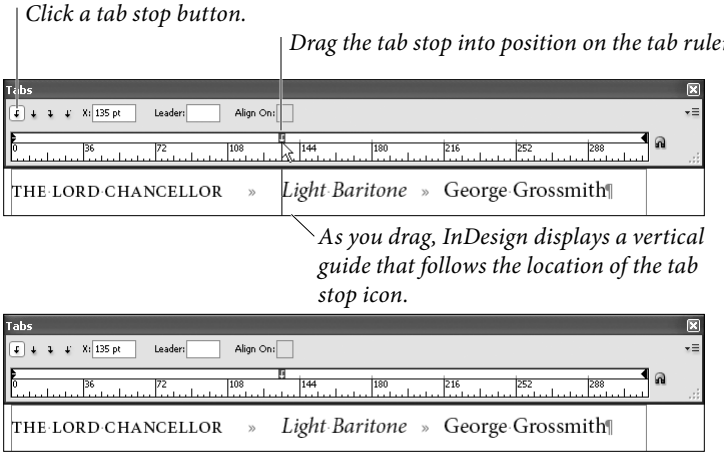
Actually, the Decimal tab stop is an "align to any character you want" tab stop. Type the character you're trying to align in the Align On field of the Tabs panel. For example, lets say you have a column of item numbers, some with asterisks. You can make the asterisks hang out to the right by typing an asterisk character in the Align On field. If the Align On character doesn't appear in the paragraph, InDesign treats the decimal tab stop as a right tab stop.

Setting Tab Stops

To set a tab stop, follow these steps (see Figure 4-36).

1. If you haven't already entered tab characters in the text, enter them.
2. Select the paragraph(s) you want to format.
3. Display the Tabs panel (press Command-Shift-T/Ctrl-Shift-T), then click the Magnet button to snap the Tabs panel into position at the top of the text frame (if possible).

FIGURE 4-36
Setting a Tab Stop



4. Click in the tab ruler and drag. As you drag, the X field shows you the position of the tab icon (relative to the left edge of the text frame). Then click one of the tab stop alignment buttons to determine the type of the tab stop.

You can also add a tab stop at a specific location on the tab ruler. To do this, enter the position you want in the X field in the Tabs panel and then press Enter. InDesign adds the tab stop.

Removing Tab Stops. To remove a tab stop, drag the tab stop icon off the tab ruler. Note that this doesn't remove any tab characters you've typed in your text, though it does make them behave differently (because you've taken away their tab stop).

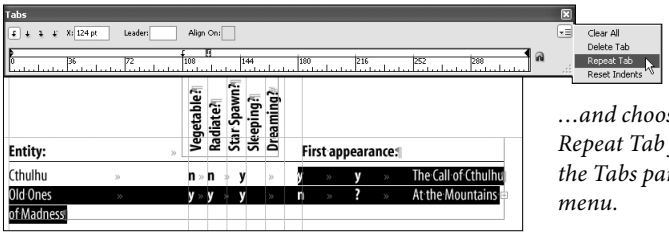
Editing Tab Stops. To change a tab stop's position, drag the tab stop on the tab ruler. Alternatively, you can select the tab stop (click on it), then enter a new value in the x field or give it a leader. Don't forget that if you want to move the tab stop by a specific amount, you can add a + or – character after the value that appears in the x field and then type the amount you want to move it ("+14mm").

To change a tab stop's alignment (from left to decimal, for instance), select the tab stop on the tab ruler and then click the tab stop button corresponding to the alignment you want. Or you can Option/Alt-click on the tab stop to cycle through the alignment types.

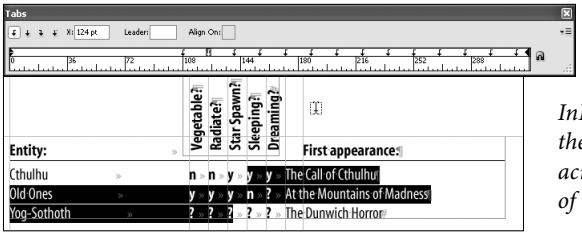
Repeating Tab Stops. To create a series of tab stops spaced an equal distance apart, select a tab stop on the tab ruler and choose Repeat Tab from the Tabs panel menu (see Figure 4-37). InDesign repeats the tab across the width of the current column. The distance between

FIGURE 4-37
Repeating a Tab Stop

Select the tab stop icon you want to repeat…



…and choose Repeat Tab from the Tabs panel menu.



InDesign repeats the tab stop across the width of the tab ruler.

the new tab stops is equal to the distance between the tab stop you selected and the previous tab stop (or indent) in the column. InDesign also deletes all the tab stops that were already to the right of the tab stop you clicked (which can be frustrating if you've placed tab stops there and weren't expecting them to disappear).

Working with Tab Leaders. A tab leader is a series of repeated characters that fill the area taken up by the tab character (see Figure 4-38). The most common tab leader character is a period—think of all of the "dot" leaders you've seen in tables of contents.

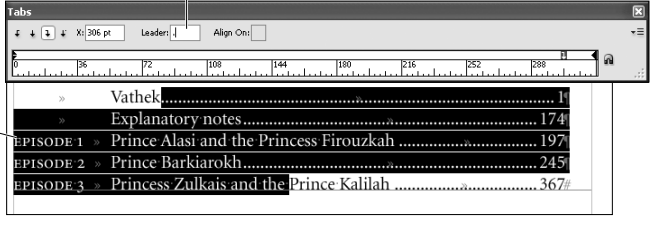
Characters in a tab leader are not spaced in the same fashion as other characters—if they were, the characters in tab leaders on successive lines would not align with each other. That would be ugly. Instead, characters in a tab leader are monospaced—positioned as if on an invisible grid. This means you'll see different amounts of space between the last character of text preceding a tab leader and the first tab leader. It's a small price to pay.

FIGURE 4-38
Applying a Tab Leader

Select some text.

…and InDesign applies a tab leader to the selected tab stop.

Select a tab stop and enter the character or characters you want to use for the tab leader in the Leader field. Press Return/Enter…



In InDesign, you can format the characters in a tab leader by selecting the tab character and applying formatting, just as you would any other character. For instance, dotted tab leaders typically look like a bunch of periods. To make them look more like traditional dot leaders, add a space after the period (in the Leader field), then select the tab character and reduce its size slightly.

Right-aligned Tabs. Setting a tab stop precisely at the right margin can be a bother; it's an even bigger bother when your art director says, "make that column narrower." Instead of using tab stops, try using a right-aligned tab character, which you can enter by pressing Shift-Tab (or add with the Insert Special Character submenu in the Type menu). The text that follows the right-aligned tab character always aligns with the right margin, even when you change the right indent or the width of the text frame.

The right aligned tab picks up the tab leader settings from the last tab stop in the line.

Adding Space Before and After Paragraphs

When you want to add extra space between paragraphs, don't use carriage returns (not even one). If you do, you're certain to end up with unwanted carriage returns at the tops of text frames when text recomposes due to editing or formatting changes. Instead of typing carriage returns, use the Space Before and Space After fields in the Paragraph or Control panel. When you add space using these controls, InDesign removes the space when the paragraph falls at the top of a text frame (see Figure 4-39). If you need to add space before a paragraph at the top of a text frame, use First Baseline offset (see Chapter 3, "Text").

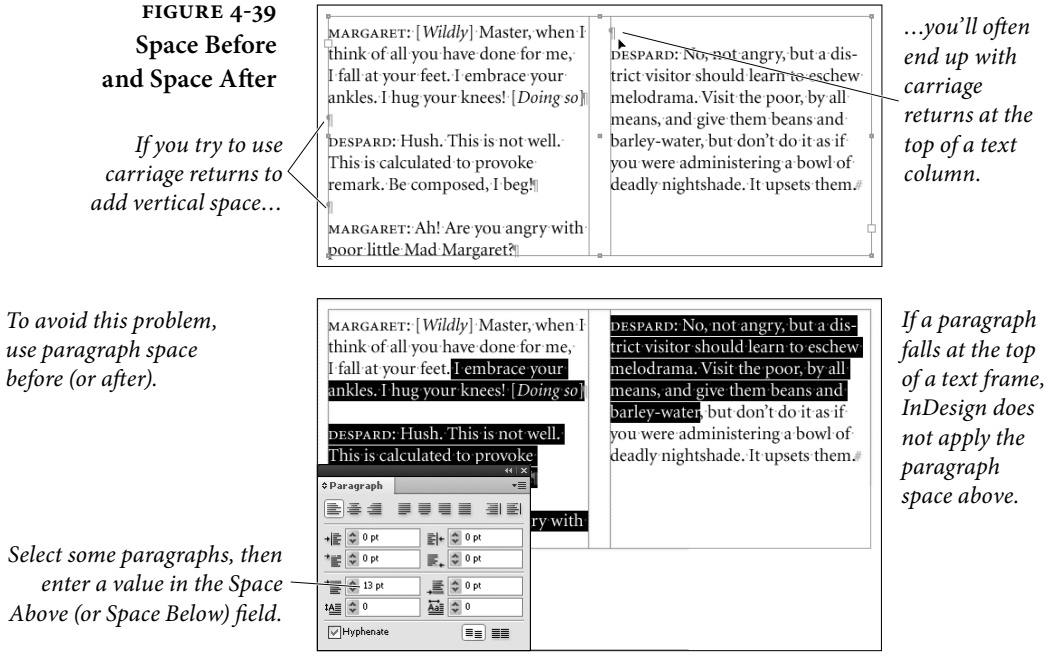
In addition, adding an exact amount of space is easier when you use the Paragraph or Control panel. Want to add four picas of vertical space above the paragraph? Enter it in the Space Before field. There's no need to guess how many carriage returns it would take to make up that vertical distance.

Align to Grid

When you have more than one column of text on a page, it's important that the baselines of the text line up across the columns. The leading should be consistent with an underlying "leading grid"—an invisible set of rules for where the baselines of text should lay. Many designers even work with leading grids on pages with a single column.

Unfortunately, in most page designs, you'll find elements that have to have leading values that differ from the leading applied to the body text. Inline graphics, paragraph rules, and headings are all examples of the sort of elements we're talking about. When one of

FIGURE 4-39
Space Before and Space After



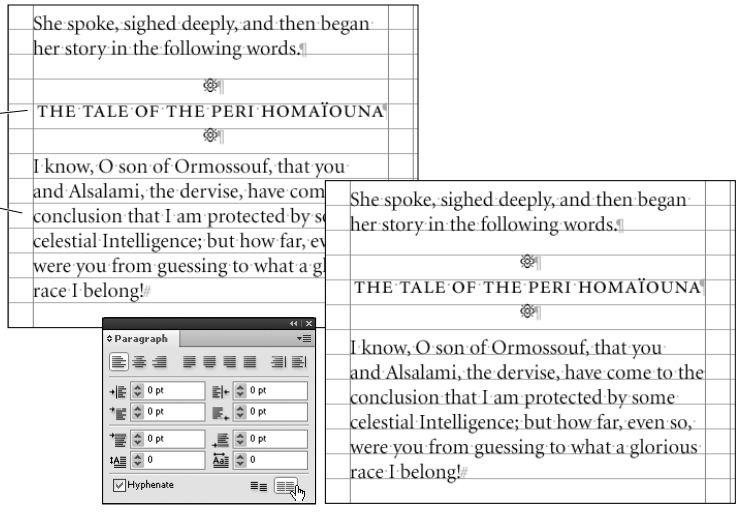
these elements appears in a column of text, the leading of the lines in that column gets thrown off.

You need to compensate for leading variations inside a column of text. "Leading creep," the misalignment of baselines in adjacent text columns, is one of the hallmarks of amateur typesetting.

While you could adjust the space above and below such intrusions, there's an easier way: use InDesign's Align to Baseline Grid. Select a paragraph and click the Align to Baseline Grid button in the Paragraph panel, and InDesign forces the baselines of the lines in the paragraph onto the baseline grid (see Figure 4-40). You can change the leading and position of the document baseline grid in the Grids pane of the Preferences dialog box. To see this grid, select Show Baseline Grid from the Grids & Guides submenu, under the View menu.

Frame-based Baseline Grids. The baseline grid can also be calculated for individual text frames. To activate a custom baseline grid, select the text frame and press Command-B/Ctrl-B to display the Text Frame Options dialog box. Click the Baseline Options tab, and then turn on the Use Custom Baseline Grid option. Use the controls to set up your custom baseline grid (see Figure 4-41). When you specify a custom grid, the Align to Grid option aligns the text baselines with the baseline grid applied to the text frame, rather than to the document baseline grid.

FIGURE 4-40
Align to Grid



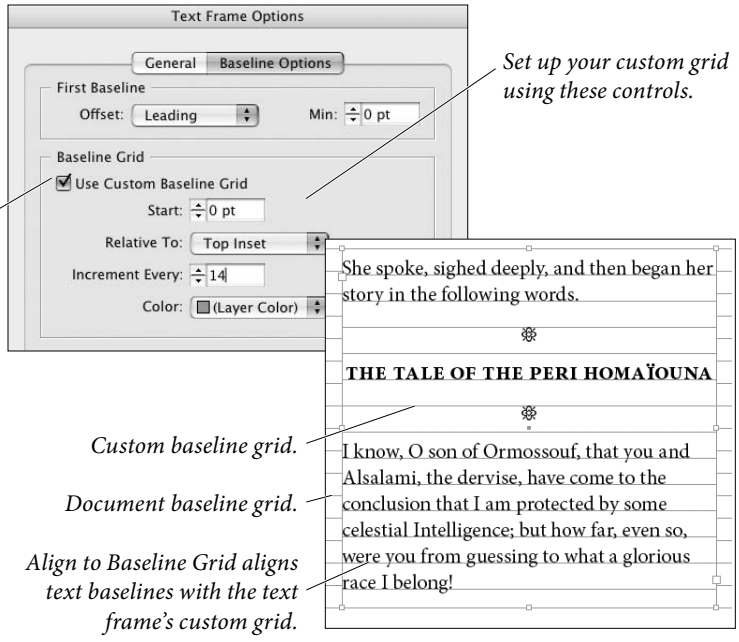
This is all very pretty…

…but it throws the leading of the following paragraph off of the leading grid.

To fix this problem, select the paragraph and click the Align Baseline to Grid button.

InDesign snaps the baselines of the text in the paragraph to the baseline grid.

FIGURE 4-41
Custom Baseline Grid



To set up a custom baseline grid for a text frame, select the frame, then open the Text Frame Options dialog box . Click the Baseline Options tab, then turn on the Use Custom Baseline Grid option.

Set up your custom grid using these controls.

Custom baseline grid.

Document baseline grid.

Align to Baseline Grid aligns text baselines with the text frame's custom grid.

Why We Rarely Use Align to Baseline. While there's no doubt that a careful study and practice of baseline grids can make your documents better looking, we rarely use the Align to Baseline Grid feature. The reason: you can get the same result by making sure your leading, Space Before, and Space After always add up to an even multiple of the leading value.

For example, if your body text has 15-point leading, then make sure your headings also have 15- or 30-point leading. If you use Space Before or Space After, make sure those values are set to a multiple of 15, such as: 15, 30, or 45 points. Finally, snap the tops of your frame to the baseline grid and set the First Baseline setting to Leading, and you can't go wrong.

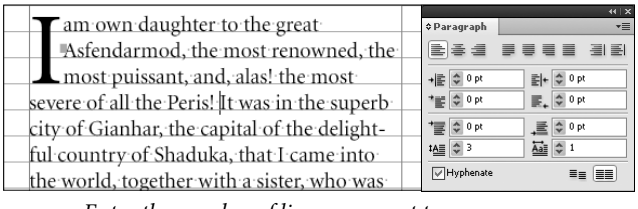
Only Align First Line to Grid. Often, sidebars in magazines or newsletters are set in a different font and leading than the main body text, and they're placed in their own text frame. You can make the first baseline of that sidebar align with the leading grid by using the Only Align First Line to Grid feature. This forces the first line of a selected paragraph to snap to the baseline grid, but then leaves the rest of the paragraph alone. To align the first baseline of a paragraph to the baseline grid, first align the whole paragraph to the baseline grid and then choose Only Align First Line to Grid from the Paragraph or Control panel menu.

Drop Caps

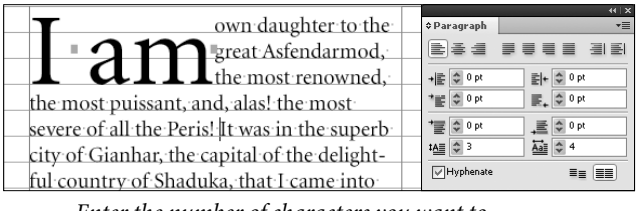
Drop caps are a paragraph-level attribute in InDesign (as they are in QuarkXPress). To apply a drop cap to a paragraph, enter a value in the Number of Lines field of the Paragraph or Control panel (this sets both the baseline shift and the point size of the drop cap). To apply the drop cap formatting to more than one character, enter a number in the Number of Characters field. InDesign enlarges the characters you specified and shifts their baseline down according to the value you entered in the Number of Lines field (see Figure 4-42).

FIGURE 4-42
Drop Caps

Select a paragraph.



Enter the number of lines you want to "drop" the initial character(s).



Enter the number of characters you want to apply the drop cap format to, if necessary.

You can also make an initial cap that drops down *and* raises up by selecting the drop cap character (or characters) and increasing the point size. To add or remove space between the drop cap and the characters that follow it, place the cursor after the drop cap and adjust the Kerning value (see "Kerning," earlier in this chapter). The only good way to get your text to follow the shape of a drop cap is to convert the character to an outline and either place that outline as frame outside the text frame or as an anchored frame with text wrap.

If you find yourself often applying character formatting to your drop caps—changing size, font, color, *etc.*—then you should create a new character style that reflects that formatting, choose Drop Caps and Nested Styles from the Control panel menu (or press Command-Option-R/Ctrl-Alt-R), and choose your character style from the Character Style pop-up menu. Of course, you can also define this as part of your paragraph style (see "Styles," later in this chapter).

The Drop Caps and Nested Styles dialog box also offers two other drop cap options: Align Left Edge and Scale Descenders. The former moves the drop cap so that its left edge is placed exactly at the left edge of the left indent—this tends to be more important with very large drop caps. The latter only takes effect when the drop cap has a descender (for example, the letter "Q" or a lower-case "p"); the whole drop cap is cleverly scaled so that the descender avoids the line below.

Type in the Margin. In InDesign, the edges of text frames are usually inviolable (apart from the adjustments applied by optical margin alignment). There's no margin release (anybody still remember typewriters?), no handy command for moving one line a bit over the edge. Or is there? Instead of a single-character drop cap, specify a two-character drop cap. Add a space to the left of the first character in the paragraph—if your paragraph is justified, this should be a space that doesn't get wider, such as an en space (Command-Shift-N/Ctrl-Shift-N). Place the cursor between the space and the drop cap and apply negative kerning until the left edge of the character moves outside of the text frame. Note, also, that using optical margin alignment may provide the effect you're looking for without all of the extra work.

Nested Styles

When we look at the formatting in our documents, we see patterns. In this book, for example, a paragraph containing a run-in heading starts with our "run-in heading" character style and then reverts to the formatting of our body text. A period separates the heading from the body text. To apply this formatting, we have to select the first sentence and apply the character style. Wouldn't it be nice if we could tell our page-layout application to apply that pattern for us?

With InDesign's nested styles, we can do just that. Nested styles give you a way to automatically apply character formatting to portions of a paragraph—the first character, the first sentence, or just the third word. Nested styles rely on you first creating a character style; we discuss how to do this later in this chapter. You might want to skip forward, read that section, and then return to this explanation.

Nested styles are perfect for automatically applying a style to a drop cap, a run-in heading (where the first sentence is styled differently from the rest of the paragraph), or any structured paragraph. Catalogs, for example, often have structured paragraphs—such as a paragraph that contains an item number followed by a title, followed by a description, followed by a price. With nested styles, you can tell InDesign to apply a different character style to each element.

You can apply a nested style as local formatting, but it's generally better to define a nested style as part of a paragraph style. To apply a nested style to one or more selected paragraphs in a story, choose Drop Caps and Nested Styles from the Paragraph or Control panel menu (or press Command-Option-R/Ctrl-Alt-R). We'll discuss how to define a paragraph style later in this chapter.

The Drop Caps and Nested Styles dialog box contains two sections: formatting for drop caps and formatting for paragraphs.

Drop Caps. Earlier in this chapter, we discussed the process of applying a drop cap to paragraph—the Drop Caps section of this dialog box is an alternate way to do the same thing.

Many designs specify that the first line of text following a drop cap be formatted a particular way—small caps are quite commonly used. With nested styles, you can accomplish this easily by adding a forced line break, as shown in Figure 4-43.

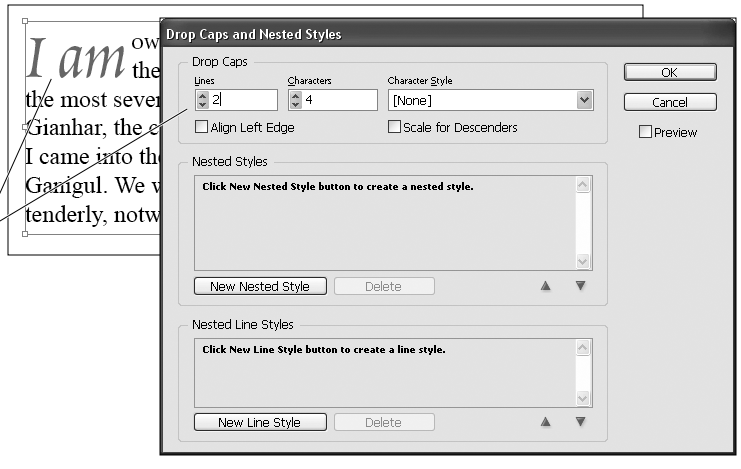


FIGURE 4-43
Drop Caps and Nested Styles

By including the drop cap as part of the paragraph's nested style definition, we can automatically apply a character style to the drop cap (which is a good thing to do, in any case).

Nested Styles. The Nested Styles section is where you build a set of rules for InDesign to follow while formatting a paragraph. Here's how you make a nested style (see Figure 4-44).

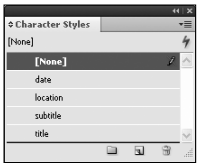
1. Display the Drop Cap and Nested Style dialog box (choose Drop Caps and Nested Styles from the Paragraph panel menu or the Control panel menu). Click the New Nested Style button.
2. Select the character style you want to apply from the first pop-up menu. Of course, you have to have defined at least one character style for this to work.
3. To activate the second option, click the word "through." Select either "up to" or "through" from this pop-up menu. Choose "through" if you want to apply the style up to *and including* a given character, or "up to" to apply the style to the text but *not* to the delimiting character.
4. Click the setting in the third column to change it from "1" to some other number, if necessary. If you want to apply your character style "up to the third word," for example, you would change this number to "3."
5. Click the last column to activate the pop-up menu, then enter a delimiter character (or choose one from the pop-up menu). To apply the style up to the first en space in the paragraph, for example, choose En Spaces from the pop-up menu. You can enter any character you want into this field—including many of the find/change metacharacters.
6. If you want another style to follow the one you just made, start at Step 1 again. You can also repeat one or more rules by choosing Repeat from the first pop-up menu, creating a loop.

End Nested Style Here. What if you want to apply a character style to some portion of your paragraph, but there's no obvious "stopping point" you can target? For example, each paragraph may require the style up to a different point. No problem: Just choose End Nested Style Character from the last pop-up menu in Step 5, above. Then place the text cursor at that point in the paragraph and choose End Nested Style Here from the Other submenu in the Insert Special Character submenu (under the Type or context menu). This is an invisible character, so it won't reflow your text. If a paragraph doesn't contain one of these special characters, InDesign applies the character style you specify to the entire paragraph.

FIGURE 4-44
Nested Styles

Thespis, or The Gods Grown Old (26 December 1871; Gaiety Theatre)
Trial by Jury, or A Bachelor's Suit (25 March 1875; Royalty Theatre)
The Sorcerer, or The Love Philtre (7 November 1877; Opera Comique)
H.M.S. Pinafore, or The Lass That Loved a Sailor (May 28, 1878; Opera Comique)
The Pirates of Penzance, or The Slave of Duty (April 2, 1880; Opera Comique)
Patience, or Bunthorne's Bride (April 23, 1881; Opera Comique)
Iolanthe, or The Peer and the Peri (November 25, 1882; Savoy Theatre)
Princess Ida, or Castle Adamant (January 5, 1884; Savoy Theatre)
The Mikado, or The Town of Titipu (March 14, 1885; Savoy Theatre)
Ruddigore, or The Witch's Curse (January 21, 1887; Savoy Theatre)
The Yeomen of the Guard (October 3, 1888; Savoy Theatre)
The Gondoliers, or The King of Barataria (December 7, 1889; Savoy Theatre)
Utopia Limited, or The Flowers of Progress (October 7, 1893; Savoy Theatre; 245 performances)
The Grand Duke, or The Statutory Duel (March 7, 1896; Savoy Theatre)

This text needs to be formatted.



We've created character styles to assist us in formatting the text.

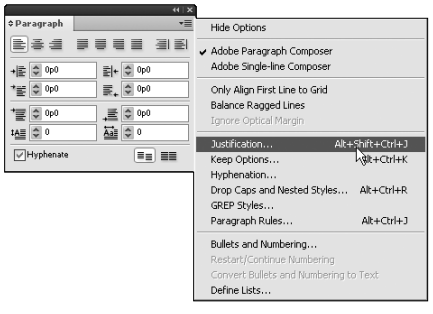
We apologize, in advance, for the complexity of this illustration (which continues on the next page). We can't help it—this stuff is nothing short of magical.

We want to format the text according to the following rules:

1. Apply the "title" style to the text up to the comma.
2. Leave the comma and "or" in the paragraph's default style.
3. Format the subtitle (the text up to the open parenthesis).
4. Format the open parenthesis character using the paragraph's default style.

Example line — Thespis, or The Gods Grown Old (26 December 1871; Gaiety Theatre)¶

5. Format the date (the text up to the semicolon).
6. Format the semicolon character using the paragraph's default style.
7. Apply the "location" character style to the theater name.
8. Format the close parenthesis character using the paragraph's default style.



Rather than work our way through the text and apply character styles manually, we choose Drop Caps and Nested Styles (from the Paragraph panel or the Control panel menu).

InDesign displays the Drop Cap and Nested Styles dialog box.

Click the New Nested Style button. InDesign creates a new nested style. Choose a character style from the first pop-up menu (you can also create a new character style, if necessary).

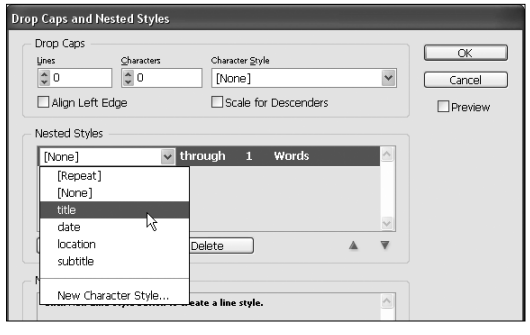


FIGURE 4-44
Applying Nested Styles (continued)

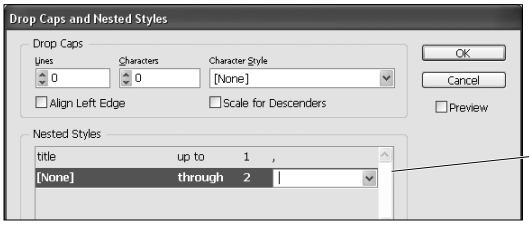
The following pop-up menus set the length of the text style range.

Choose "up to" or "through" from this pop-up menu.

Enter the number of delimiter characters.

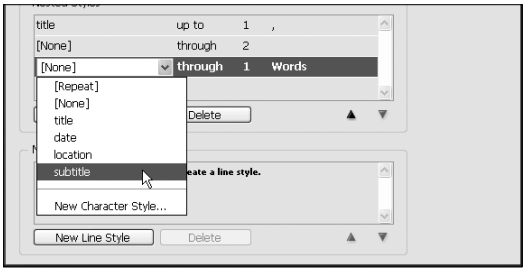
Enter a delimiter character (or choose one of the preset delimiters from the pop-up menu).

Following the title, we want to leave the comma and the word "or" in the default character formatting for the paragraph. Click New Nested Style and leave the Style pop-up menu set to "[None]".



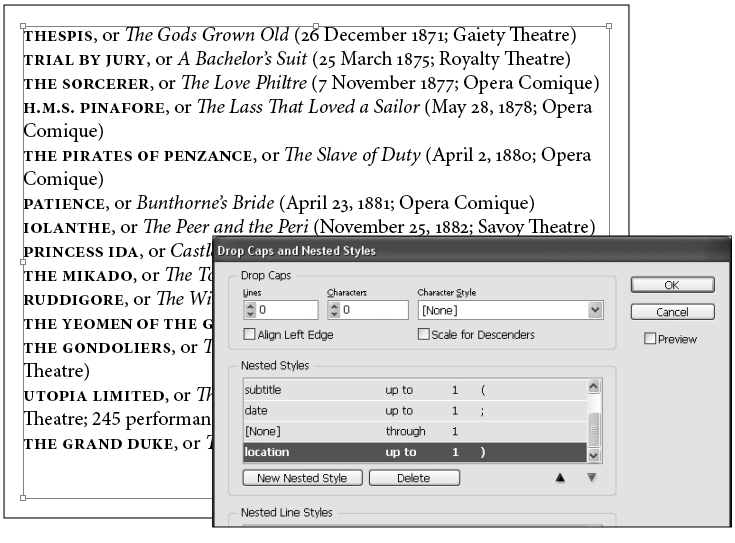
We entered a space here.

At this point, we're ready to set up the formatting for the subtitle. The character at the end of the subtitle text is an open parenthesis, so we enter that character and set the range to "up to."



We create a further six character styles to cover all of the rules we've defined. When we're done, we have formatted all of the text. No selecting, no clicking, and no keyboard shortcuts. This process takes far longer to explain than it does to do.

It's even better when you make the nested styles part of a paragraph style, as we'll demonstrate later in this chapter.



Repeating Nested Styles

Nested styles have a special setting, which appears on the Character Style pop-up menu in the Drop Caps and Nested Styles dialog box: the Repeat option. You can use this option to repeat some or all of the sequence of nested styles you've entered, as shown in Figure 4-45. Nested styles appearing below the Repeat nested style are ignored.

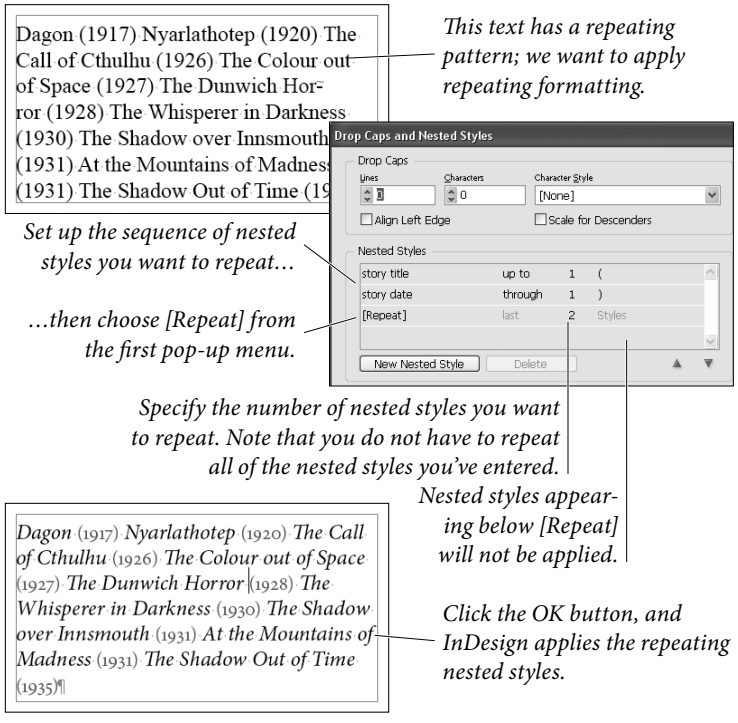


FIGURE 4-45
Repeating a Nested Style

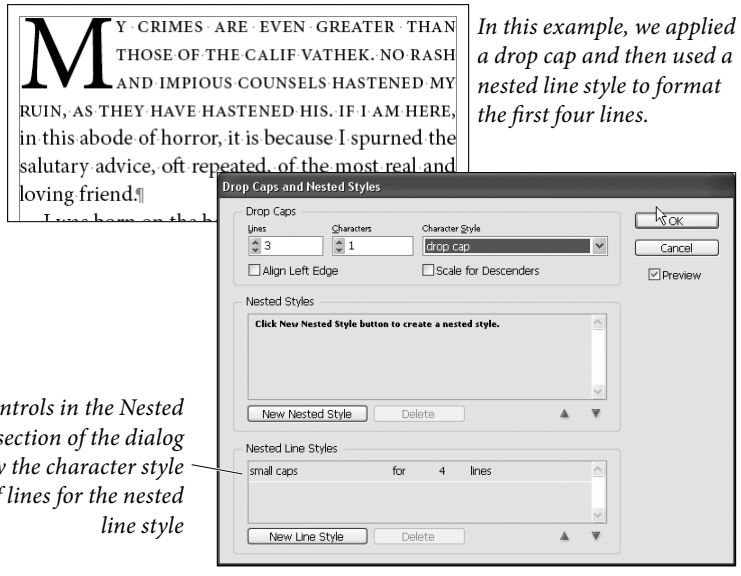
Nested Line Styles

Nested line styles are a special case of a nested style. In a nested line style, the end of a line defines the end of the style. Nested line styles are particularly useful when you want to apply special formatting to the first line of a paragraph, or repeat sequences of line formatting through a paragraph.

To create a nested line style, follow these steps (see Figure 4-46).

1. Select some text, then choose Drop Caps and Nested Styles from the Paragraph panel menu (or from the Control panel menu). InDesign displays the Drop Caps and Nested Styles dialog box.
2. Use the controls in the Nested Line Styles section of the dialog box to specify the character style and number of lines for the nested line style. Like nested styles, nested line styles can repeat.
3. Click the OK button to close the dialog and apply the nested line style(s).

FIGURE 4-46
Nested Line Styles



In this example, we applied a drop cap and then used a nested line style to format the first four lines.

Use the controls in the Nested Line Styles section of the dialog box to specify the character style and number of lines for the nested line style

Nested GREP Styles

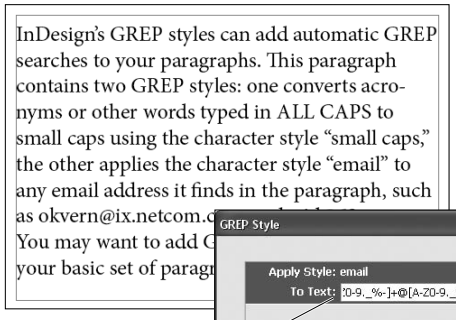
While nested styles make use of ordered sequences of special characters and other text, GREP styles can apply a character style to any text that matches a GREP expression—in any location, repetition, or order in a paragraph. This feature is brilliant, and we think that your basic set of paragraph styles will probably acquire a number of nested GREP styles as soon as you fully understand what it does.

To create a GREP style, follow the steps below (see Figure 4-47).

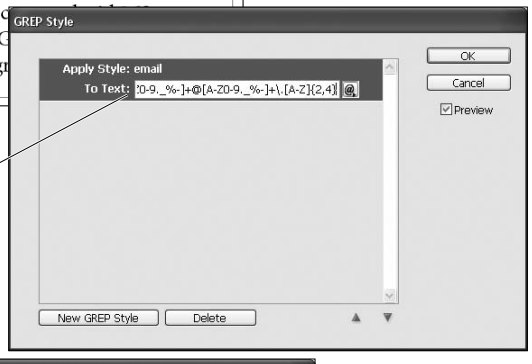
1. Select some text, then choose GREP Styles from the Paragraph panel menu (or from the Control panel menu). InDesign displays the GREP Styles dialog box. It's a good idea to turn on the Preview option—that way, you can see the effect of your GREP style as you construct it.
2. Click the New Grep Style button. InDesign adds a new GREP style.
3. Select a character style from the Apply Style pop-up menu.
4. Enter the GREP expression in the To Text field. As in the GREP panel of the Find/Change dialog box, you can build the GREP expression using the associated pop-up menu. Even if you have Preview turned on, however, InDesign will not apply the GREP expression until you press Return.
5. Click the OK button to close the dialog box and apply the GREP style.

To delete a GREP style, select the style and click the Delete button.

FIGURE 4-47
GREP Styles

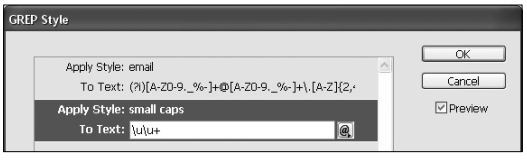


Before GREP styles.

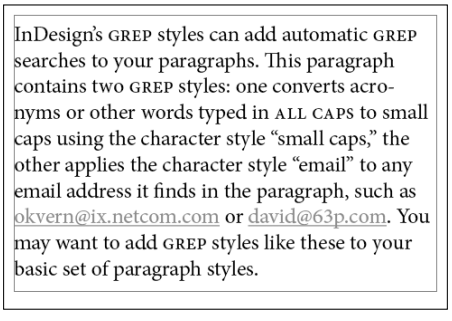


Click the New GREP Style button, select a character style from the Apply Style pop-up menu, and then enter a GREP Expression in the To Text field.

A paragraph can contain an apparently limitless number of GREP styles.



In this example, our GREP styles have formatted words typed in all caps as Open Type All Small Caps, and applied a character style with an underline to the email addresses in the text. No manual formatting was used.



Multi-Line Composition

Composition—the method our desktop publishing program uses to fit text into a line—isn't glamorous. It's not going to be the focus of any glossy magazine advertisement. In fact, most people never consciously notice good or bad composition. We are convinced, however, that readers perceive the difference between well spaced and poorly spaced text. Good spacing not only improves readability, it also conveys an aura of quality to the publication or organization. In short, it's worth caring about.

There are four basic ways to fit text onto a line:

- Controlling the spacing between the letters.
- Controlling the spacing between the words.

- Adjusting the size of the characters themselves.
- Breaking the words at line endings by hyphenating.

If you're serious about type, you already know that a large part of your typesetting time is spent fixing bad line breaks and lines with poor word and letter spacing. In our experience, fully one third of our typesetting and production time in QuarkXPress or other programs is spent "walking the lines"—fixing spacing problems.

Other desktop publishing programs use a "single line composer" to compose lines of text. As the program arranges the characters on each line, it only considers the spacing of that line, which means that adjacent lines may have dramatically different spacing. The greater the variation of letter and word spacing among lines in a paragraph, the harder it is to read (and the less appealing it is to look at).

InDesign, however, has both a single-line composer and a multi-line composer, which can examine an entire paragraph at a time.

How does it work? The multi-line composer (called Adobe Paragraph Composer) creates a list of possible line break points in the lines it examines. It then ranks the different sets of possible break points, considering the effect of each break point on spacing and hyphenation. Finally, it chooses the best of the alternatives. You'd think that this would take a lot of time—but it doesn't. When you use the default settings, you get composition speed that's equal to that of a single-line composition system, and you get better-looking text (see Figure 4-48).

Multi-line composition takes some getting used to because characters *preceding* the cursor will sometimes *move* as you enter or edit text—something you won't see in most other programs. You really can't be certain of the position of the line breaks in a paragraph until you've entered the last word in the paragraph.

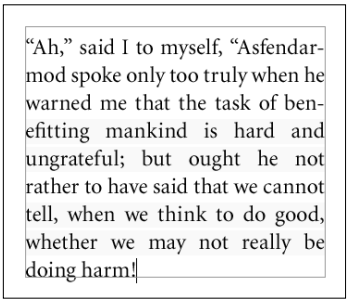
In some rare cases you might want turn the Adobe Paragraph Composer off and exercise manual control over the line breaks in a paragraph—when lines absolutely must break a particular way.

Multi-line composition is on by default; to use the single-line composition method, select a paragraph and choose Adobe Single-line Composer from the Paragraph or Control panel menu (or in the Justification dialog box). To turn multi-line composition back on again for the paragraph, choose Adobe Paragraph Composer.

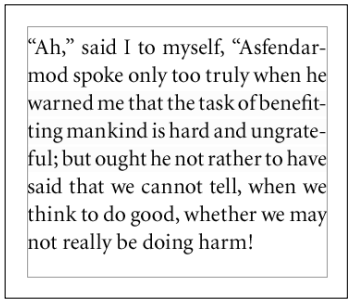
With InDesign CS6, you can also select both single-line and multi-line World Ready composers, which were previously available only in the special InDesign ME version. These options are especially useful for composing text in right-to-left languages.

FIGURE 4-48
Multi-Line Composition

Note the extreme variation in word and letter spacing from line to line in the text composed using the Single-line composer.



Single-line Composer.



Paragraph Composer

Hyphenation Controls

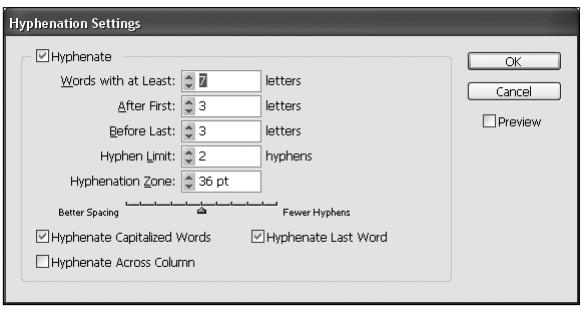
If you're tired of having your favorite page layout program hyphenate the word "image" after the "m," you'll like InDesign's hyphenation controls. To set the hyphenation options for a paragraph, choose Hyphenation from the Paragraph or Control panel's menu. InDesign displays the Hyphenation dialog box (see Figure 4-49). QuarkXPress users are used to having both hyphenation and justification settings in one dialog box; in InDesign they're broken into two. Also, in QuarkXPress, you have to make and save an H&J setting first, and then apply it to a paragraph. In InDesign, you select a paragraph and change its hyphenation and justification settings.

The first checkbox in the Hyphenation Settings dialog box, simply labeled Hyphenate, controls whether the selected paragraph or paragraphs will be hyphenated. This is identical to turning on and off the Hyphenate checkbox in the Paragraph panel. Then there are seven other controls that determine the hyphenation rules.

Words with at Least. You can direct InDesign's hyphenation system to leave short words alone using the Words with at Least option. If you don't want short words to break, you can set this to 5 or higher.

After First. The value you enter here sets the minimum size, in characters, of the word fragment preceding a hyphen. Many typesetters dislike two-letter fragments, so they increase this value to three.

FIGURE 4-49
Hyphenation Settings Dialog Box



Before Last. The value you enter here sets the minimum size, in characters, of the word fragment following a hyphen. Some people don't mind if the "ly" in "truly" sits all by itself on a line. You care about type, so you set this to at least three.

Hyphen Limit. You can limit the number of consecutive hyphens you'll allow to appear at the left edge of a column of text using the Hyphen Limit field. Enter a value greater than one to allow consecutive hyphens.

Hyphenation Zone. Another way to limit the number of hyphens in a paragraph is the Hyphenation Zone setting. The idea is that there is an invisible zone along the right margin of each paragraph. If InDesign is trying to break a word at the end of a line, it looks to see where the hyphenation zone is. If the word *before* the potentially hyphenated word falls inside the zone, then InDesign just gives up and pushes the word onto the next line (without hyphenating it). If the previous word does not fall into the zone, then InDesign will hyphenate the word.

That's the concept, at least. As it turns out, InDesign's composition algorithms are complex enough that the hyphenation zone is often overridden by other factors, especially when using the Paragraph Composer. In addition, the Hyphenation Zone setting doesn't have any effect at all on justified text. In general, for non-justified text, larger amounts mean fewer hyphens but more variation in line lengths ("rag").

Hyphenation Slider. Someone, somewhere must have complained that InDesign's hyphenation controls weren't flexible enough, because those wacky engineers at Adobe have added the Hyphenation Slider to the Hyphenation Settings dialog box. We're sure there's a lot of math behind what this slider is doing, but all you really need to know is that you can move the slider back and forth between Better Spacing and Fewer Hyphens to get a more pleasing appearance (turn on preview to see the effect of the slider).

This control is called "Nigel" because it goes all the way to eleven.

Hyphenate Capitalized Words. To prevent capitalized words (i.e., proper names) from hyphenating, turn off this option.

Hyphenate Last Words. We pride ourselves on having open minds and strong stomachs, but there are few things more nauseating than the last word of a paragraph being hyphenated, leaving a little runt

on the last line. We won't say that it's impossible to avoid it entirely, but you should at least turn off the Hyphenate Last Words checkbox, so that it won't happen automatically.

Hyphenate Across Columns. Our generous, kind, and patient publisher asks little from us (besides the best book we can muster), but they do ask one thing: Please don't allow words to hyphenate from one page to another. In older editions, we had to proof each page manually. Now we simply turn off the Hyphenate Across Columns checkbox in our body text paragraph style. Note that this stops hyphenation across all columns, even from one column in a multicolumn text frame to the next. By the way, we have seen this control fail, so it appears that InDesign considers it a request rather than a rule; it tries not to hyphenate across a column, but it will if it thinks it needs to.

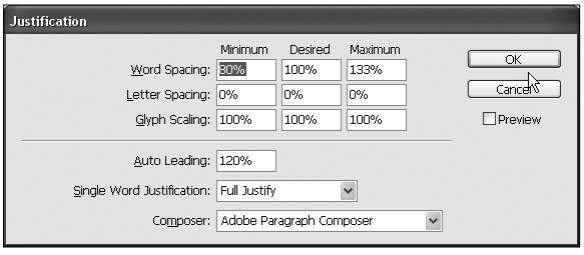
Discretionary Hyphens. There's another way to control hyphenation: Use a discretionary hyphen character. When you type a discretionary hyphen (Command-Shift-hyphen/Ctrl-Shift-hyphen) in a word, you're telling InDesign that you wouldn't mind if the word hyphenates here. This doesn't force the program to hyphenate the word at that point; it just gives it the option. This is much better than typing a regular hyphen because if (or when) your text reflows, you won't be stuck with hyphens littered in the middles of your paragraphs—the discretionary hyphen "disappears" when it's not needed. Another way to get a discretionary hyphen is to use the Insert Special Character submenu (in the Type menu or the context-sensitive menu).

By the way, longtime QuarkXPress users know that in that program you can place a discretionary hyphen before a word to make it not break. That's also true in InDesign, but, if you want a word (or phrase) not to hyphenate, select the text and turn on the No Break option in the Character panel's menu. If it's a word that you think should never be hyphenated, or should always be hyphenated differently than InDesign thinks, you can add it to your user dictionary (see "Adding Words to the User Dictionary" in Chapter 3, "Text").

Controlling Word and Letter Spacing

When InDesign composes the text in your publications, it does so by following the spacing rules you've laid down using the controls in the Justification dialog box (choose Justification from the Paragraph panel menu or press Command-Option-Shift-J/Ctrl-Alt-Shift-J to display the dialog box; see Figure 4-50). Contrary to popular opinion, this dialog box controls all text composition, not only that of justified text.

FIGURE 4-50
Justification Dialog Box



This dialog box offers six controls: Word Spacing, Letter Spacing, Glyph Scaling, Auto Leading, Single Word Justification, and Composer. The important thing to remember is that you will never find a set of spacing values that will work for all fonts, point sizes, and line lengths. The text itself plays a role: spacing settings that work for one author may not work for another, even when the typesetting specifications are the same. You have to experiment to discover the settings that work best for you and your publications.

InDesign's default settings give you a reasonable starting point. The spacing values encourage wide word spacing over narrow word spacing, and attempt to discourage letter spacing.

Word Spacing. You can adjust the amount of space InDesign places between words by changing the Minimum, Desired, and Maximum percentages. In non-justified text, only the Desired value matters. In InDesign, the values in the word spacing fields are *percentages of* the standard word space (the width of the space is defined by the font's designer, and is stored in the font). The defaults tend to encourage wide word spacing over narrow word spacing in justified text.

Letter Spacing. You can adjust the amount of space the program places between each character in your paragraphs by changing the Minimum, Desired, and Maximum percentages. Again, in text that isn't justified, only the Desired value makes a difference. Note that these percentages represent the *amount of variation* from a standard spacing unit—the "spaceband" defined in the font. By default, the percentages are all set to zero, which discourages letter spacing.

Glyph Scaling. When you enter anything other than 100% in any of the Glyph Scaling fields, you give InDesign permission to scale the characters in the paragraph to make them fit. Ole and David disagree on usefulness of this feature. Ole is not a type purist, but he does not see the point in distorting character shapes when other, better options are available. Why take the risk? David, on the other hand insists that no one can see the difference when you allow InDesign

to scale glyphs by plus or minus one percent (and sometimes even two). Ole thinks that this is something like thinking that it's not committing a crime if no one catches you.

Both authors agree that glyph scaling might come in handy if you have exhausted *every other available option* to get a line to fit. What you do is, of course, up to you and your conscience.

Auto Leading. The Auto Leading feature is easy: This controls how InDesign calculates the leading of characters that have a leading of Auto (see "Leading," earlier in this chapter, for why we almost never use Auto leading). This control is here, rather than in one of the Preferences dialog boxes, because the base autoleading percentage is a property of individual paragraphs (unlike QuarkXPress, where the autoleading percentage is set at the document level).

Single Word Justification. What do you want InDesign to do when a word in the middle of a paragraph is so long (or a column so narrow) that only that one word fits on the line? If the line isn't justified, it's no big deal. But if the line is justified, do you want InDesign to add letterspacing to spread the word out across the line? Or make it flush left, flush right, or centered? That's what the Single Word Justification pop-up menu controls.

Composer. Earlier in this chapter, we discussed the Paragraph Composer and how it's different from the Single Line composer. Here's one more place you can specify which InDesign should use.

Balance Ragged Lines

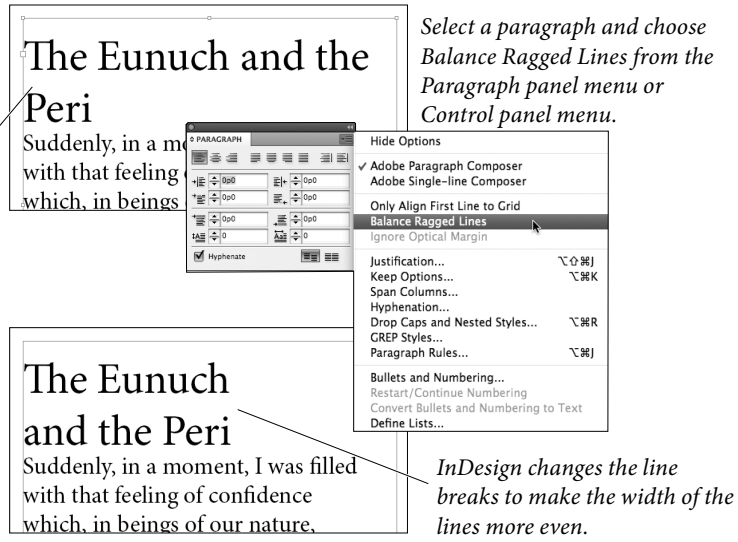
Sometimes headlines or headings are way out of balance—and we don't just mean the political slant. We mean that the lines are of wildly varying length. The first line fills the column; the second line contains a single short word. This is, at best, unsightly; at worst, it makes the text hard to read.

InDesign's Balance Ragged Lines feature can help you make the line widths in a paragraph more even. To do this, choose Balance Ragged Lines from the Paragraph panel or Control panel menu. (Note that this feature only works on non-justified paragraphs.) Take a look at Figure 4-51 to see the effect of Balance Ragged Lines.

If the last line of the paragraph is significantly narrower than the other lines, the program breaks the text so that the last line is wider.

Balance Ragged Lines generally produces an inverted pyramid shape—that is, the first line is longer than the second line, the third line is shorter than the second line, and so on. This matches Ole's expectations, but is the opposite of what David expects.

FIGURE 4-51
Balancing Ragged Lines



Highlighting Typographic Problems

InDesign can "flag" text composition problems—cases where the program has had to break your rules for composing text, or where substituted fonts appear in your publication. Open the Preferences dialog box, choose the Composition pane, then turn on the options in the Highlight section of the Composition Preferences dialog box. Lines in which InDesign has had to violate composition rules you've established (using the Justification and Keep Options dialog boxes) are highlighted in yellow; substituted fonts are highlighted in pink (see Figure 4-52). We usually work with these turned on so we can quickly identify "problem" lines.

Paragraph Keep Options

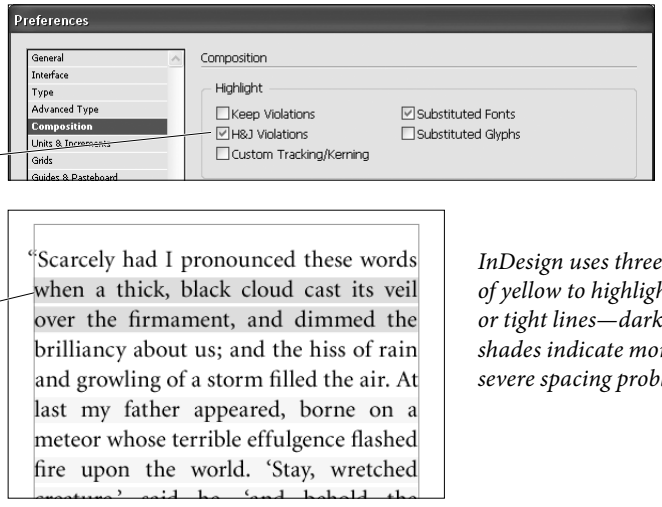
A *widow* is the last line of a paragraph that winds up all by itself at the top of a column or page. An *orphan* is the first line of a paragraph that lands all by itself at the bottom of a column or page. Widows and orphans are the bane of a typesetter's existence.

Designers sometimes also refer to the single-word last line of a paragraph as either a widow or an orphan. To avoid the confusion, we often just use the word *runt*.

All typographic widows and orphans are bad, but certain kinds are really bad—for example, a widow line that consists of only one word, or even the last part of a hyphenated word. Another related typographic horror is the heading that stands alone with its following paragraph on the next page.

Fortunately, InDesign has a set of controls that can easily prevent widows and orphans from sneaking into your document. These controls—along with a setting that lets you force a paragraph to begin at a particular place—live in the Keep Options dialog box, which you

FIGURE 4-52
Highlighting Loose and Tight Lines



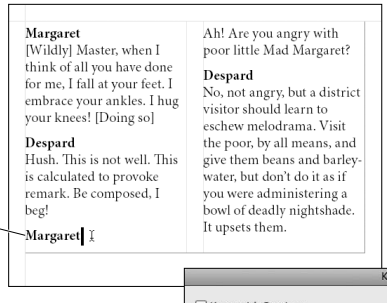
When you turn on the H&J Violations option…

…InDesign highlights lines that break the spacing ranges you set in the Justification dialog box.

InDesign uses three shades of yellow to highlight loose or tight lines—darker shades indicate more severe spacing problems.

can find by selecting Keep Options from the Paragraph panel's menu, or by pressing Command-Option-K/Ctrl-Alt-K (see Figure 4-53). There are four parts to this dialog box: Keep with Previous, Keep with Next, Keep Lines Together, and Start Paragraph.

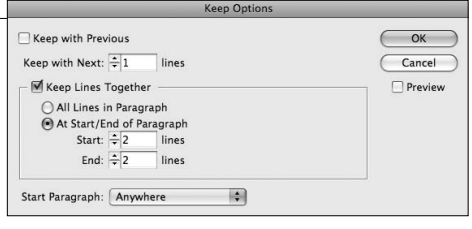
FIGURE 4-53
Keep Options

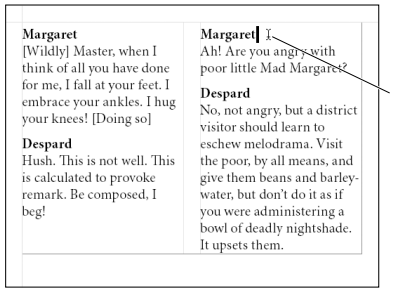


In addition to the Keep with Next control demonstrated in this example, the Keep Options dialog box contains other options that you can use to control the way that paragraphs break (or don't break) across columns and pages.

This heading has come "unstuck" from the paragraph following it.

To prevent this, select the heading paragraph and display the Keep Options dialog box.





Enter a value in the Keep with Next field. This way, when the paragraph following the heading moves to a new page or column, the heading follows along.

Keep with Previous. The Keep with Previous option keeps the top line of the paragraph with the previous paragraph, such as when you're adding notes below only some entries in a list.

Keep with Next. The Keep with Next Lines feature helps you ensure that headings and the paragraphs that follow them are kept together. If the paragraph is pushed onto a new column, a new page, or below an obstructing object, the heading follows. It's rare that we need to type more than 1 in the Lines field.

Keep Lines Together. The Keep Lines Together feature is the primary control over widows and orphans. When you turn on the Keep Lines Together checkbox and choose All Lines in Paragraph, InDesign won't break the paragraph across column or pages.

You can control the number of lines that should be kept together at the beginning and end of the paragraph by choosing At Start/End of Paragraph. The value you type in the Start field determines the minimum number of lines that InDesign allows at the beginning of a paragraph. For example, a Start value of 2 means that if at least two lines of that paragraph cannot be placed on the page, then the entire paragraph is pushed over to the next page. The value specified in the End field determines the minimum number of lines that InDesign lets fall alone at the top of a column or after an obstruction. Setting both Start and End to 2 means you'll never get a widow or orphan.

Start Paragraph. Use the options on the Start Paragraph pop-up menu to force a column or page break before your selected paragraph. For example, if you always want a particular paragraph to sit at the top of a page, select the paragraph and choose On Next Page from the Start Paragraph pop-up menu.

Note that you can also get a similar effect by choosing an item from the Insert Break Character submenu in the Type menu. The Start Paragraph feature is better, however, because you can use it in a definition of a paragraph style (see "Styles," later in this chapter).

Bullets and Numbering

As the human attention span has grown shorter under the stresses of modern life, lists of one sort or another have come to dominate our texts. Abraham Lincoln could spend several days delivering a single perfect paragraph to an informed audience; we must convey the same information in an executive summary that takes no more

than nanoseconds to parse. InDesign aids and abets this diminution of the human intellect by providing the Bullets and Numbering feature, which provides:

- Bullets.
- Numbering.

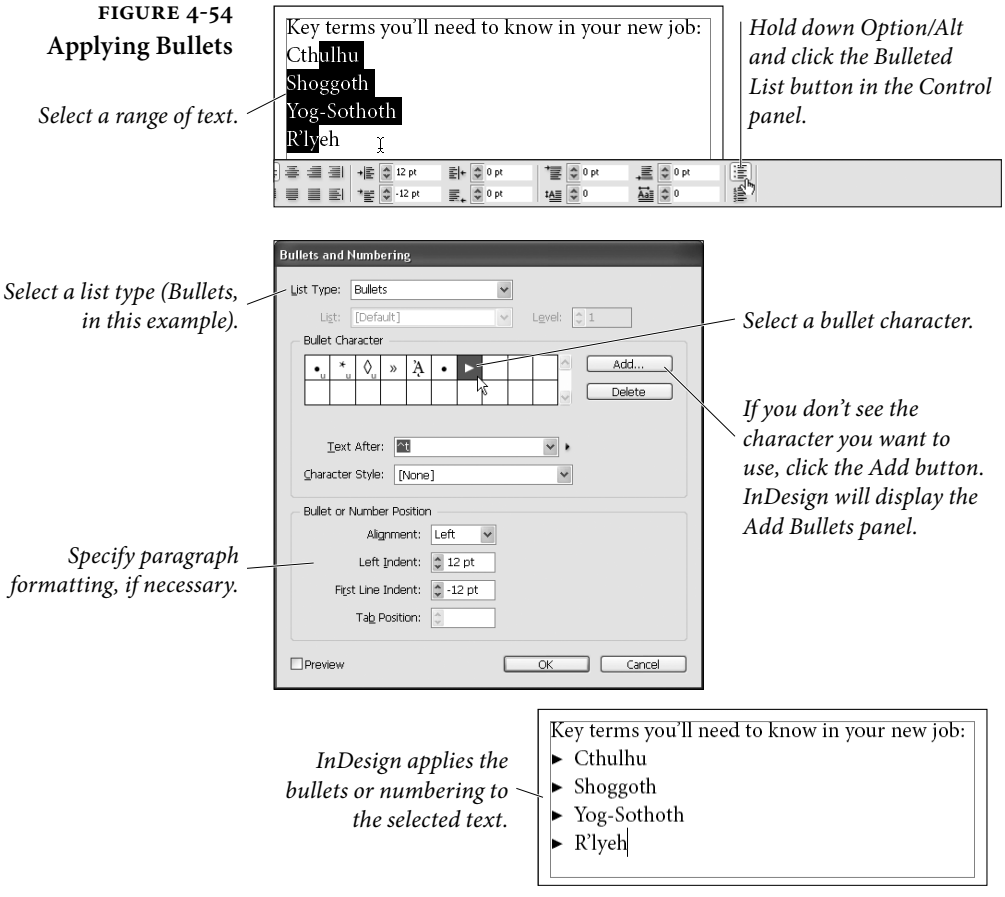
Bullets and Numbering is a paragraph level attribute that applies a bullet character or a numeral to the start of the paragraph. Applying a bullet is straightforward; numbering is a bit more complicated.

Applying Bullets

The simplest way to apply bullets to a selection of paragraphs is to click the Bulleted List button in the Paragraph view of the Control panel (or choose Apply Bullets from the Bulleted & Numbered Lists submenu of the Type menu). Follow the steps below, and you can control the formatting and position of the bullets (see Figure 4-54):

1. Select a range of text.
2. Choose Bullets and Numbering from the Paragraph panel or Control panel menu. You can also Option/Alt-click the Bulleted List button in the Paragraph view of the Control panel. InDesign displays the Bullets and Numbering dialog box.
3. Choose Bullets from the List Type pop-up menu.
4. Pick from among the choices in the Bullet Character section, which works very much like the Glyphs panel described earlier in this chapter—the dialog contains a short list of characters, but you can click the Add button to choose characters from any of the available fonts and add them then to the list.
5. If you want the bullet to be followed by a tab, leave the Text After field set to `^t`. If you'd prefer the bullet followed by something else (such as an en space), you can type it in that field or pick from the flyout menu to the right of the field.
6. You can apply formatting to the bullet character in the Character Style pop-up menu (assuming you have defined a style).
7. Adjust the position of the bullet in the Bullet or Number Position section. The Left Indent and First Line Indent fields control the indents for the entire paragraph (overriding any other indents you've set). To hang the bullet in the margin, you'd want a positive Left Indent and a negative First Line Indent.

FIGURE 4-54
Applying Bullets



If the First Line Indent is set to zero and your Text After is set to a tab character, the position of the text after the bullet is defined by the first tab stop. If you've assigned tab stops already, you can ignore this.

The Alignment pop-up menu lets you control the position of the bullet at the beginning of the paragraph—Left, Right, or Centered—but it only works when your Left Indent is large enough to allow the character to move (InDesign won't allow the bullet to fall outside the text frame).

8. Once you've got the inserted characters to look the way you want them to (turn on the Preview option), click the OK button to apply the list formatting to the selected paragraphs.

Default Bullets. If you choose a custom bullet character with the Add button in the Bullets and Numbering dialog box, InDesign remembers that bullet in the currently-open document. If you need

that same bullet character in other documents, you can add it to the list of default bullets:

1. Close all documents in InDesign.
2. Open the Bullets and Numbering dialog box.
3. Set the Type pop-up menu to Bullets.
4. Use the Add button to add your desired bullet character.
5. If you want this character to be the default bullet (the one InDesign gives you if you don't specify any other), select it.
6. Set the Type pop-up menu back to None and then click OK.

Applying Numbering

When Adobe first implemented the automatic numbering feature, we complained that it was anemic and useless. They responded in the next version by adding so many features that its now not only extremely useful but also somewhat overwhelming to use. Fortunately, it's all logical if you take it step by step and understand which parts of the Bullets and Numbering dialog box you can ignore.

The simplest way to apply numbering to one or more selected paragraphs is to click the Numbered List button in the Control panel (when it's in paragraph mode), or choose Apply Numbers from the Bulleted & Numbered Lists submenu, under the Type menu. This gives you a basic numbered list, starting at 1.

Continuing Numbering. Let's say you have five paragraphs, but the third paragraph shouldn't be numbered (that is, the section numbered "2" has two paragraphs). The fastest way to accomplish this is to select all five paragraphs, turn on numbering, then select just the third paragraph and turn numbering off.

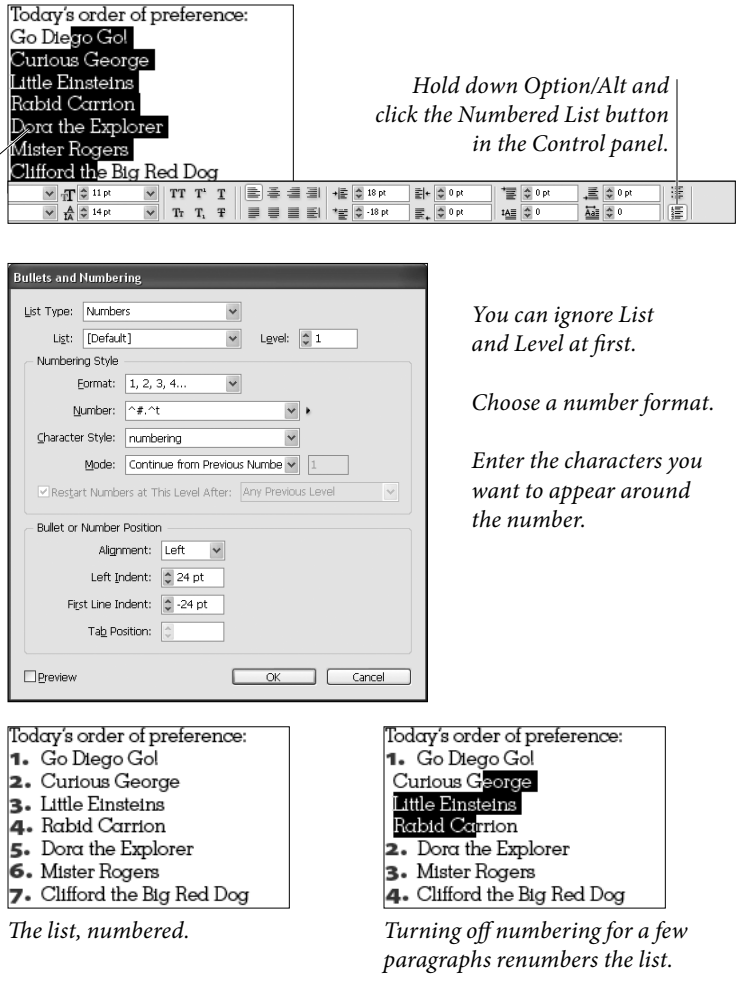
Alternately, you could assign numbering to the first two paragraphs and then number the last two paragraphs (which will start at "1" again). Then place the cursor in the fourth paragraph (which is currently numbered "1") and choose Continue Numbering from either the Context menu or the Bulleted & Numbered Lists submenu, under the Type menu.

Formatting Numbers. The default formatting applied to automatic numbers is dull as rocks: the number—set in the same font, size, color, and styling as the first character of the paragraph—followed by a tab. In order to spice up your numbering, select Bullets and Numbering from the Control panel menu (or Option/Alt-click the Numbered

List button in the Control panel). When the List Type pop-up menu is set to Numbers, you can adjust the following settings in the Numbering Style section of the dialog box (see Figure 4-55).

- **Format.** You can choose from among normal numerals (such as 1, 2, 3, *etc.*), Roman numerals (I, II, III, *etc.*), or alphabet characters (a, b, c, *etc.*) from the Format pop-up menu. Choose None to omit the number entirely, though it's rare that you'd want to.
- **Number.** You can control how the number appears by typing codes into the Number field. The default value, `^#.^t`, means type the current number for this list, followed by a period, then followed by a tab. You don't have to remember the codes—you can use the pop-up menu associated with the field. If you do use a tab character, it has to be the last code in this field.

FIGURE 4-55
Applying Numbering



The list, numbered.

Turning off numbering for a few paragraphs renumbers the list.

You can type pretty much anything in the Number field. For example, you could type `Item No. ^#^_` which means type "Item No." followed by a space, then the number, then an en dash.

- **Character Style.** InDesign applies the character style you choose from this pop-up menu to everything in the Number field.
- **Mode.** Use this pop-up menu to specify whether the list should Continue from Previous Number or Start At a specific number.

Positioning Numbers. You can adjust the position of your number in the same ways we discussed positioning bullets. You can make the right edge of the numbers align by choosing Right from the Alignment pop-up menu and setting the Left Indent to a positive number.

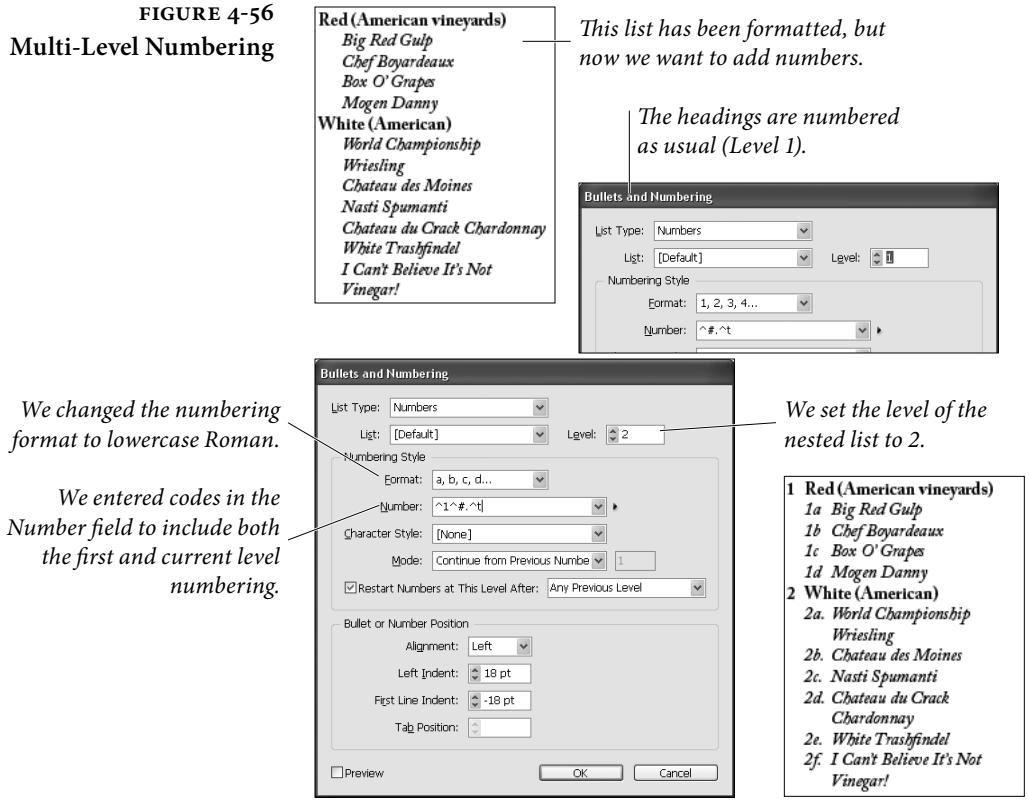
Multi-Level Numbering. What if you need a sub-list? For example, after number 4, you might have 4a, 4b, 4c, and so on. Or in a long technical document, you might have sections numbered 1.1.1, then 1.1.2, then 1.1.3, then 1.2.1, and so on. To pull off this kind of numbering, you need to assign levels in the Bullets and Numbering dialog box, then—optionally—adjust the Number field's codes (see Figure 4-56).

This can get confusing, so let's focus on that 4a, 4b, 4c example. After you select the paragraphs you want to affect (in this case, the three paragraphs after paragraph 4), open the dialog box and change the Level field to 2. This defines a sub-list inside the main numbered list. Now choose the lower-case alphabet from the Format pop-up menu and change the Number field to `^1^#.^t` (which means "type the most recent level 1 number, then the current number in this sub-list, then a period and a tab"). You may also want to adjust the Left Indent in the Position section so that the sub-list is further indented.

Creating Named Lists. Numbering isn't just for a few paragraphs in a single story. You can create far more complex kinds of numbered lists that continue across multiple text frames, or even across multiple documents in a book. You can also have multiple numbered lists in parallel, for example, figure numbering and table numbering. The key to all these tricks is to define named lists. (InDesign just calls these "lists," but we call them "named lists" to avoid confusion with the generic "lists" that we've been discussing.)

You can define a named list by choosing Define Lists from the Bulleted & Numbered Lists submenu (under the Type menu) and then clicking the New button in the Define Lists dialog box. Or, if you already have the Bullets and Numbering dialog box open, you

FIGURE 4-56
Multi-Level Numbering



can choose New List from the List pop-up menu. In either case, you get the New List dialog box, in which you can type the list's name and choose whether you want this numbered list to continue across multiple stories (that is, across more than one unthreaded text frame) and/or across more than one document in a book (see Figure 4-57).

Once you have a named list defined, you can assign it to a paragraph by choosing it from the List pop-up menu in the Bullets and Numbering dialog box.

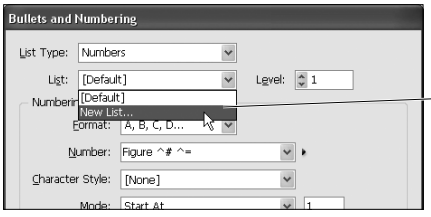
However, the order in which paragraphs are numbered may be confusing to you. Here are the rules:

- In general, numbering follows page order. For example, if you have an unthreaded text frame on page 1 and another on page 2, InDesign will number paragraphs on page 1 first—just as you'd expect.
- If you have more than one frame on a page (and those frames aren't threaded), numbering in the frames is based on the order in which the frames were created—not the order on which they appear on the page.

FIGURE 4-57
Named Lists

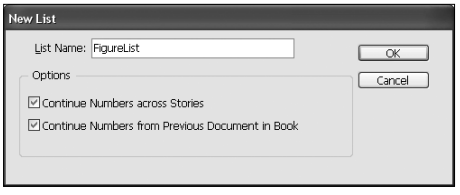
To number these captions, we select the three text frames…

…and apply numbering. Because the text frames are not threaded together, we need to create a new named list to keep our figure numbering straight.

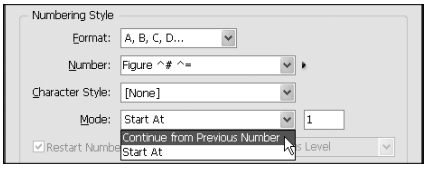


Choose New List from the List pop-up menu.

InDesign displays the New List dialog box.



Enter a name for the list, and turn on Continue Numbers Across Stories.



Back in the Bullets and Numbering dialog box, we changed the Format and set Mode to Continue from Previous Number.

Remember that each frame on a page is numbered in the order it was created—not its position on the page!

Each caption is automatically numbered… or, um, "lettered."

- All the numbers in a single story (including multiple threaded text frames) are numbered at the same time—starting with the first frame in the thread—even if they're on different pages. For example, if you have a story that jumps from page 1 to page 5, and you have an unthreaded text frame on page 2, the numbered paragraphs on page 5 would be smaller than those on page 2 because InDesign is numbering the threaded story first.

  Even stranger, if for some reason that story was instead threaded from page 5 to page 1, the numbering would start on page 2, then continue on page 5, then end on page 1.

- Paragraphs inside anchored text frames are numbered along with the story they're in. Let's say you're numbering your figures and some of your figure numbers are anchored inside a text story that spans from page 1 to 100—but one figure number is sitting in an unthreaded, unanchored text frame on page 2.

InDesign will number all 100 pages, including anchored frames, before it gets around to numbering page 2.

This means that you should either keep all your text frames anchored or keep them unanchored—mixing and matching will cause you heartache.

If you want a numbered list to continue from one document to the next in a book panel, your named list has to be present in all the documents—fortunately, the book panel's Synchronize feature can copy named lists for you (see Chapter 8, "Long Documents").

Removing Bullets and Numbering

To remove bullets or numbering, select the paragraphs in question and then click once on the Bulleted List or Numbered List button in the Control panel (whichever is currently highlighted). Alternately, you could choose Remove Bullets or Remove Numbering from the Bulleted & Numbered Lists submenu, under the Type menu. Or you could display the Bullets and Numbering dialog box and choose None from the List Type pop-up menu. Whichever you choose, the bullets and numbers are gone, baby, gone.

Converting Bullets and Numbers to Normal Text

To change the characters inserted by the Bullets and Numbering feature to normal text (*i.e.*, text you can select with the Type tool and format using InDesign's typesetting features), select the paragraphs and choose Convert Numbering to Text or Convert Bullets to Text from the Context menu. You can also find this command in the Paragraph panel menu, the Control panel menu, and the Bulleted & Numbered Lists submenu, under the Type menu. If you select a range of text that contains both bulleted and numbered paragraphs, choose Convert Bullets and Numbering to Text.

Bullets and Numbering in Paragraph Styles

We've been talking about applying numbering or bullets directly to paragraphs as local formatting, but in the real world we'd virtually never do this. Instead, we'd first create a paragraph style that includes the bullet or numbering, and then apply that paragraph style to the paragraphs in question. We talk about styles below, but suffice it to say that we often work with two or three paragraph styles for each type of list. For example, in this book, we use a "numbered list" style that includes both numbering and a little Space After; and we use a "numbered list first" (which we apply to the first item in the list) that is based on "numbered list" but also includes a little Space Before. Plus, we use a "numbered list last" (which we apply to the last item in the list), which includes a little Space After.

Styles

When you think about the text in your publication, chances are good you're thinking of each paragraph as being a representative of a particular kind of text. You're thinking, "That's a headline, that's a subhead, and that's a photo caption." Chances are also good that you're thinking of those paragraphs as having certain formatting attributes: font, size, leading, and indents.

That's what text styles do—they bundle all those attributes together so you can apply them to text with a single click. But there's more—if you then change your mind about the formatting, you can edit the style, and all the text with that style applied to it (that is, "tagged" with the style) is reformatted automatically.

Once you've created a text style for a specific kind of text, you'll never have to claw your way through the Character panel or Paragraph panel again. Unless, of course, you want to apply a local formatting override to your styled text, which you're always free to do.

Global versus Local Formatting. We've been using the term "local formatting." What are we talking about? The key to understanding text styles is understanding the difference between style-based formatting and local formatting.

Local formatting is what you get when you select text and apply formatting directly, using the Character panel or the choices on the Type menu. When you apply formatting using text styles, on the other hand, you're applying "global" formatting (that is, formatting specified by the selected style).

If local formatting has been applied to text that has had a paragraph style applied to it, you'll see a "+" after the style name in the Paragraph Styles panel when the text is selected (see Figure 4-58).

Plus What? When you see that the text you've selected in a styled paragraph contains a local override, how can you tell what that local override is? If you have tool tips turned on, you can move the cursor over the style name, and InDesign will display a list of the

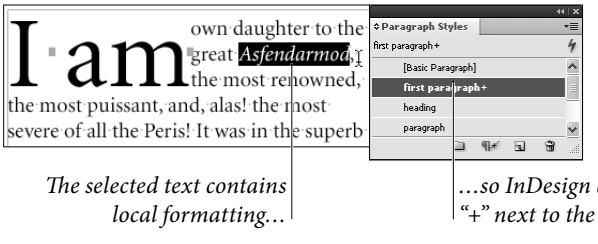


FIGURE 4-58
Styles and Local Overrides

local overrides. Alternatively, you can choose New Paragraph Style from the Paragraph Styles panel menu. Look at the list of attributes in the Style Settings list at the bottom of the panel—it'll say "<stylename> + next: Same Style +" (where "<stylename>" is the name of the style applied to the paragraph) and a list of formatting. The items in the list are the local formatting. Click Cancel (or press Command-period/Esc) to close this dialog box without creating a new style.

Incorrect Style Order. Paragraph and character styles should appear in alphabetical order in their respective panels. Sometimes, though, the panels get confused and list them in a near-random order (probably the order in which you created the styles, which is silly). If that happens, just choose Sort by Name from the panel menu.

Styles Are More than Formatting. When you apply a style to a paragraph (which we call "tagging" a paragraph with a style), you're doing more than just applying the formatting defined by the style. You're telling InDesign what the paragraph is—not just what it looks like, but what role it has to play in your publication. Is the paragraph important? Is it an insignificant legal notice in type that's intentionally too small to read? The style says it all.

The most important thing to remember when you're creating and applying styles is that tagging a paragraph with a style creates a link between the paragraph and all other paragraphs tagged with that style, and between the paragraph and the definition of the style. Change the style's definition, and watch the formatting and behavior of the paragraphs tagged with that style change to match.

Character Styles

By now, most of us are used to the idea of paragraph styles, which give us a way to apply multiple paragraph formatting attributes to an entire paragraph with a single action. (If you're not familiar with paragraph styles, we discuss them in the next section.) Character styles are just like paragraph styles, except that they can be applied to ranges of text smaller than an entire paragraph (and, obviously, they lack paragraph formatting features, such as alignment). Applying a character style to a text selection establishes a link between that text and the definition of the style—edit the style, and the formatting of the text changes.

Use character styles for any character formatting you apply over and over again. Run-in headings, drop caps, and special ornamental characters are all good candidates for character styles. Each time you use a character style, you're saving yourself several seconds you would have spent fiddling with settings in the Character panel or the

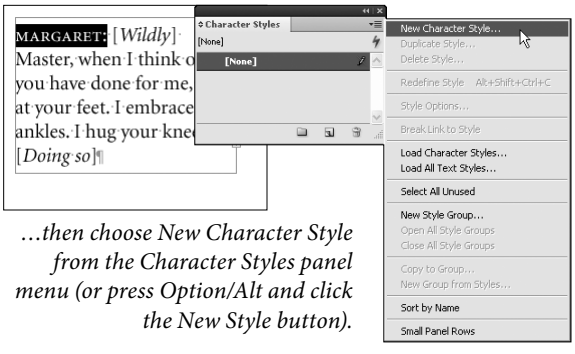
Type menu. It might not seem like much, but saving a few seconds several hundred times a day can add up.

Creating Character Styles. The easiest way to create a character style is to build it "by example" (see Figure 4-59).

1. Select some text that has the formatting you want.
2. Hold down Option/Alt and click the Create New Style button at the bottom of the Character Styles panel (or select New Character Style from the Character Styles panel menu). InDesign displays the New Character Style dialog box.
3. At this point, if you want to create a relationship between this style and another character style, you can choose that style from the Based On pop-up menu (see "Creating Parent-Child Style Relationships," later in this chapter).

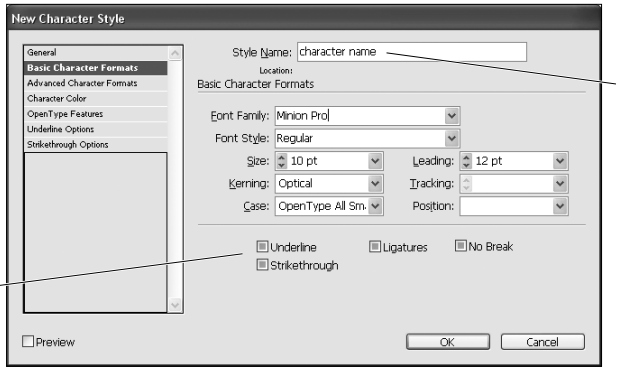
FIGURE 4-59
Creating a Character Style

To create a new character style, select a range of text that has the formatting you want…



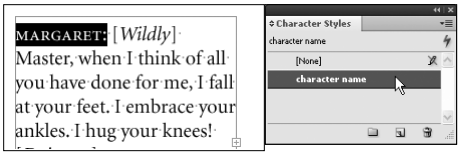
…then choose New Character Style from the Character Styles panel menu (or press Option/Alt and click the New Style button).

InDesign defines a new character style based on the formatting of the selected text.



Enter a name for the style.

Note that InDesign does not define character formatting attributes that are the same as the default formatting of the surrounding text.



InDesign adds the new character style to the list of character styles, but it won't necessarily apply it to the selected text for you.

4. Now give your style a name. You can also assign a keyboard shortcut to the character style—the key used must use a modifier key (Command, Ctrl, or Shift and a number key from the numeric keypad; NumLock must be on to define the shortcut).

When you create a character style, InDesign won't automatically apply the style to the text you selected in Step 1 unless you turn on the Apply Style to Selection checkbox in the General pane of the New Character Style dialog box. If you neglect to turn on this helpful checkbox, you'll have to apply the style to the selected text manually.

QuarkXPress Users Beware: In QuarkXPress, a character style always defines *all* the character formatting of the text—font, color, size, and other attributes. InDesign's character styles, however, are defined by *differences* between the character formatting of the selected text and the default character formatting of the surrounding text. In InDesign you can create a character style which, when applied to text, changes only its size and color, but retains all other underlying formatting.

This is actually a good thing—it means you can create character styles that affect some, but not all, of the attributes of a selection. It's different from the way that almost every other application defines character styles, and it takes some getting used to.

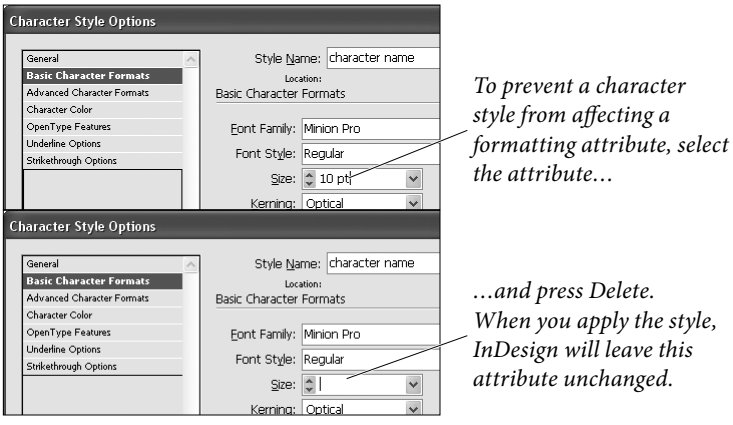
Character Style Tips. Here are a few things to keep in mind when defining character styles in InDesign.

- If you're building a character style based on example text (as we suggested earlier), InDesign only picks up the formatting differences between the text you've selected and the paragraph style applied to the paragraph. For example, if the underlying paragraph style uses the font Minion Pro Italic, and the text you've selected uses the same font, the Font attribute of the character style will not be defined automatically. If you want the font to be part of the character style definition, you can add it once you have the New Character Style dialog box open (select the font from the Font Family pop-up menu in the Basic Character Formats pane).
- If you want your character style to be defined by *every* attribute of your text selection, you can use the CreateCharacterStyle script (see Chapter 12, "Scripting," for more on the example scripts that come with InDesign). Or you can create the

character style from scratch (not from example text), specifying the font, size, color, leading, and all other formatting.

- Clicking the New Style button in the Character Styles panel creates a new character style based on whatever style was selected in the panel. It doesn't open a dialog box.
- If you want to "undefine" an attribute in a character style, select and delete the current value (see Figure 4-60).

FIGURE 4-60
Undefining Attributes



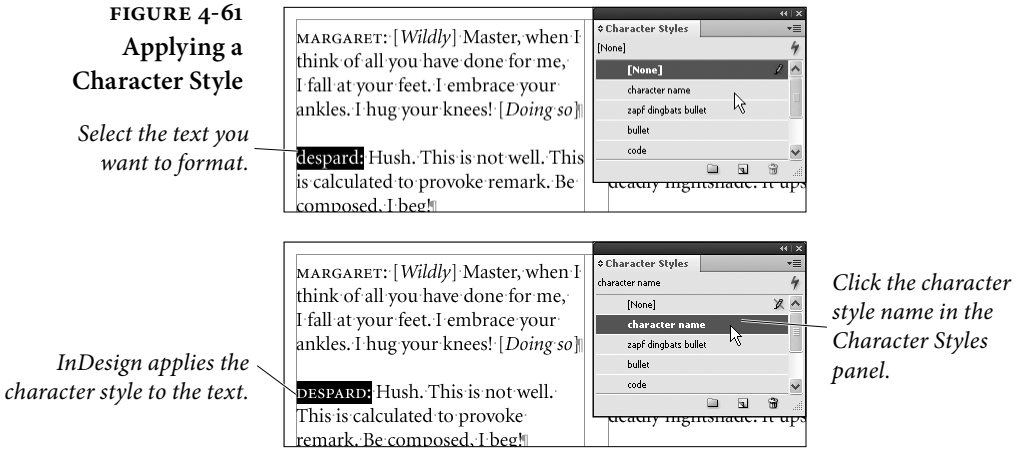
Applying Character Styles. To apply a character style, select some text and do any one of the following things (see Figure 4-61).

- Click the character style name in the Character Styles panel.
- Press the keyboard shortcut you assigned to the character style.
- Point at the style name in the Character Styles panel and choose Apply from the context menu.
- Press Command-Enter/Ctrl Enter to display the Quick Apply panel, type the name of the style, and then press Enter.

Again, applying a character style changes only those attributes that are defined in the style. This can cause grave confusion and hair-pulling if you're used to the way QuarkXPress does it. If you apply a character style that applies only the underline type style and color, for example—InDesign leaves all other character formatting as is.

To remove a character style from a text selection, click None in the Character Styles panel—this reverts the text back to the underlying formatting of the paragraph style. If you want to remove the character style and leave the formatting alone (convert it to local formatting), choose Break Link to Style from the panel menu. This is

FIGURE 4-61
Applying a Character Style



sometimes useful when you want some text to be formatted using the formatting of a given character style, but you don't want it linked to that style (because you know the style definition might change).

Editing Character Styles. The great thing about styles is that you can always change them later, and those changes ripple throughout your document. To edit a character style, you can use any or all of the following approaches—all of them display the Character Style Options dialog box, which you can use to change the attributes of the style.

- Hold down Command-Option-Shift/Ctrl-Alt-Shift and double-click the style name in the Character Styles panel.
- Point at the style you want to edit in the Character Styles panel and choose Edit from the context menu.
- Select the style and choose Style Options from the Character Styles panel menu.
- Double-click the style name in the Character Styles panel.

The first two approaches above do not apply the style; the latter two apply the style to the selected text, or to the document default formatting when no text is selected. Be aware of this difference as you go to edit a style—otherwise, you run the risk of accidentally applying the character style.

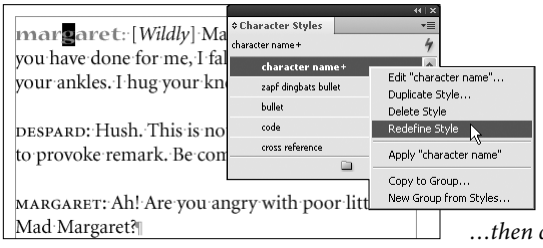
Redefining Character Styles. Editing a character style through the Character Style Options dialog box works fine, but is kind of boring. For quick changes, try this: Find some text tagged with the character style you want to redefine, then apply local formatting to it (change it

to the way you want the style to be defined). A "+" will appear next to the character style name in the Character Styles panel. Next, without deselecting the text, press Command-Option-Shift-C/Ctrl-Alt-Shift-C. InDesign automatically redefines the character style based on the selected text (see Figure 4-62).

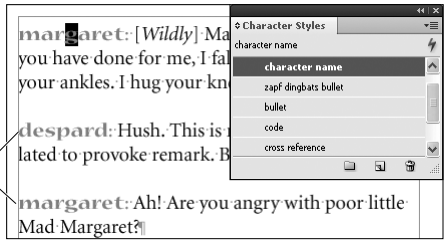
Alternatively, you can select the text and choose Redefine Style from the Character Styles panel menu. Or you could point at the style name in the panel and choose Redefine from the context menu. But the keyboard shortcut is more fun.

FIGURE 4-62
Redefining a Character Style

Apply local formatting to an instance of the character style you want to redefine…



…then choose Redefine Style from the Character Styles panel context menu.



InDesign updates the character style's definition based on the formatting of the selected text.

Deleting character styles. To remove a character style, press Command-Shift-A/Ctrl-Shift-A to deselect everything (do this so that you don't accidentally apply the character style to text), then select the character style and choose Delete Style from the Character Styles panel menu (or click the Delete Style button in the panel).

InDesign displays the Delete Character Style dialog box, where you can select a replacement style (including no style). If you choose another character style, InDesign applies that character style to the text that had been formatted with the deleted style. If you choose no style, the text formatted with the style using the character style doesn't change appearance—it becomes local formatting.

Paragraph Styles

Paragraph styles encapsulate all text formatting—both paragraph formatting and character formatting.

Basic Style. If you look at the Paragraph Styles panel, you'll always see a "Basic Paragraph" style. This is something like Word's (infamous) "Normal" style, and provides a kind of default style for all text.

We tend not to use this style, or base any other style on it, because we've found it can cause problems as we move text from document to document. In a nutshell: If you have defined Basic Paragraph Style one way, then you copy a paragraph tagged with that style to a new document, the text formatting changes because InDesign applies the new document's Basic Paragraph Style definition. That's usually not what you were hoping for.

Creating Paragraph Styles. The easiest way (in our opinion) to create a text style is to format an example paragraph using local formatting, then create a new style based on that paragraph (see Figure 4-63).

1. Select a formatted paragraph.
2. Display the Paragraph Styles panel, if it's not already visible (press Command/Ctrl-F11).
3. Choose New Paragraph Style from the Paragraph Style pop-up menu in the Control panel, or from the Paragraph Styles panel menu (or Option/Alt-click the New Style button) to open the New Paragraph Style dialog box.
4. Enter a name for the style in the Style Name field. You could leave the name set to the default, but we think it's better to enter a descriptive name—"heading 1" is quite a bit easier to remember than "Paragraph Style 6."
5. You can also assign a Next Style (see "Next Styles" later in this chapter) and a keyboard shortcut to the style—the shortcut must use a modifier key (Shift, Command/Ctrl, Option/Alt, or some combination of the above) and a number key from the numeric keypad (NumLock must be on to define the shortcut).
6. Turn on the Apply Style to Selection checkbox in the General pane of the New Paragraph Style dialog box. (Otherwise, the style won't be applied to the paragraph your text cursor is in.)
7. Click the OK button.

The style definition includes all the character and paragraph formatting applied to the first character in the selected "example" text.

If you work by the hour, you can also define a paragraph style from scratch, rather than basing your style on an example:

1. Choose "New Style" from the Paragraph Styles panel menu. InDesign displays the New Style dialog box.

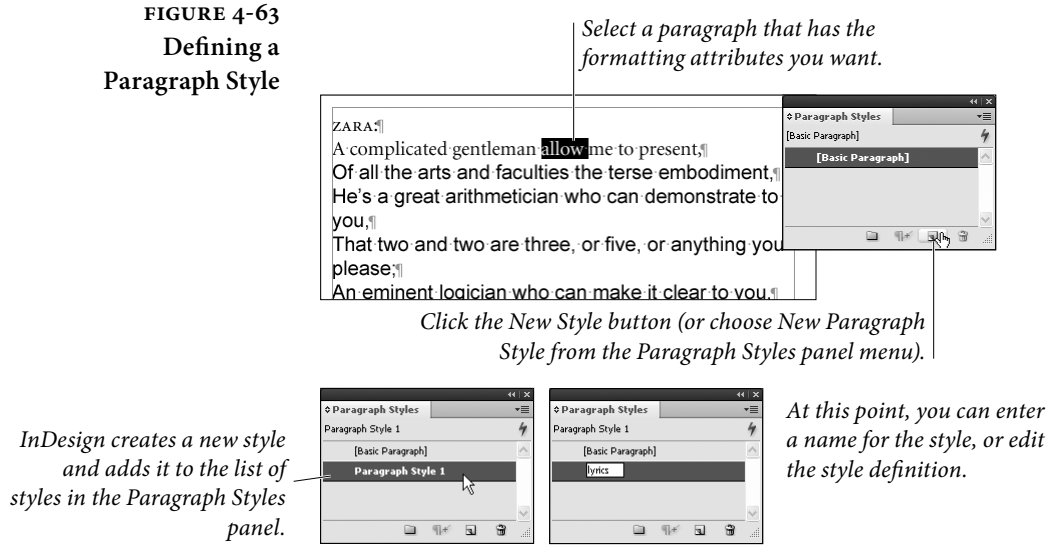


FIGURE 4-63
Defining a Paragraph Style

2. Work your way through the dialog box, setting the options as you want them for your new style. When everything looks the way you want it to, press Return/Enter to close the dialog box.

Creating a style this way is a little bit more awkward than simply basing a style on an example paragraph, but some people prefer it. We've met at least one person who likes setting tabs "without all that pesky text in the way."

Applying Paragraph Styles. To apply a paragraph style, select a paragraph or series of paragraphs (remember, you don't have to select the entire paragraph to apply paragraph formatting) and click a style name in the Paragraph Styles panel (see Figure 4-64). Alternatively, if you've defined a keyboard shortcut for the paragraph style, you can press the shortcut.

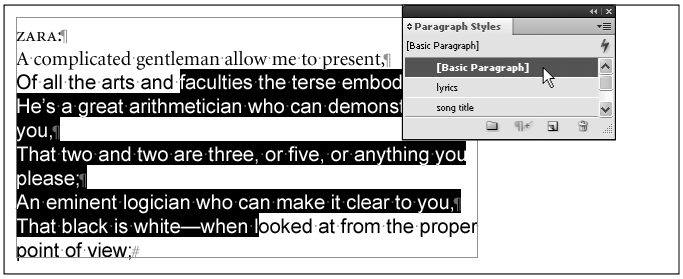
When you simply click a paragraph style to apply it, InDesign retains all the local formatting, so italic text remains italic. The one exception to this rule is when every character in the paragraph has local formatting—that stuff always gets removed.

To remove all local formatting as you apply a paragraph style, hold down Option/Alt as you click the paragraph style name. Any formatting applied using character styles is retained.

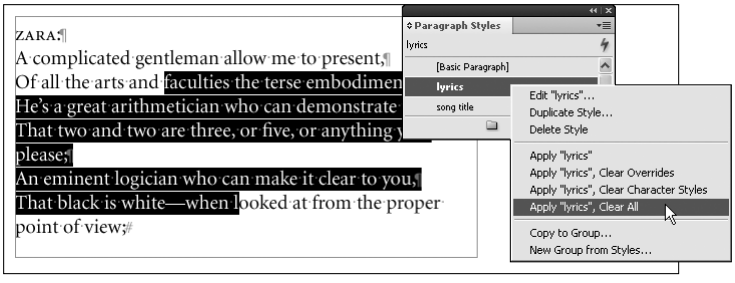
To remove all local formatting and remove formatting applied by character styles, hold down Option-Shift/Alt-Shift as you click the paragraph style name.

FIGURE 4-64
Applying a Paragraph Style

Select the paragraphs you want to format (remember, you don't need to select the entire paragraph).



Click a style name in the Paragraph Styles panel, or use the Context menu. InDesign applies the paragraph style to the selected paragraphs.



Alternatively, you can use the Context menu in the Paragraph Styles panel to control which local formatting overrides you want to clear and/or keep.

To remove all local formatting (not including character styles) after you've applied a style, click the Clear Override button at the bottom of the Paragraph Styles panel. To remove all local character formatting, hold down Command/Ctrl as you click the button; to remove paragraph formatting, hold down Command-Shift/Ctrl-Shift as you click.

To remove a paragraph style from a text selection, choose Break Link to Style from the Paragraph Styles panel menu. Note that this does not change the formatting or the look of the selected paragraphs—it simply applies the formatting applied by the paragraph style as local formatting. As we said in the "Character Styles" section, you can think of this as breaking the link between the paragraph and the style definition.

Editing Paragraph Styles. To edit a paragraph style, you can use any or all of the following approaches—all of them display the Paragraph Style Options dialog box, which you can use to change the attributes of the paragraph style.

- Hold down Command-Option-Shift/Ctrl-Alt-Shift and double-click the paragraph style name in the Paragraph Styles panel.
- Point at the style you want to edit in the Paragraph Styles panel and choose Edit from the context menu.

- Select the style and choose Style Options from the Paragraph Styles panel menu.
- Double-click the style name in the Paragraph Styles panel.

The first two approaches above do not apply the style; the latter two apply the style to the selected text, or to the document default formatting when no text is selected. Be aware of this difference as you go to edit a style—accidentally setting the default font for a document to a style featuring hot pink dingbats can be a frustrating and embarrassing experience.

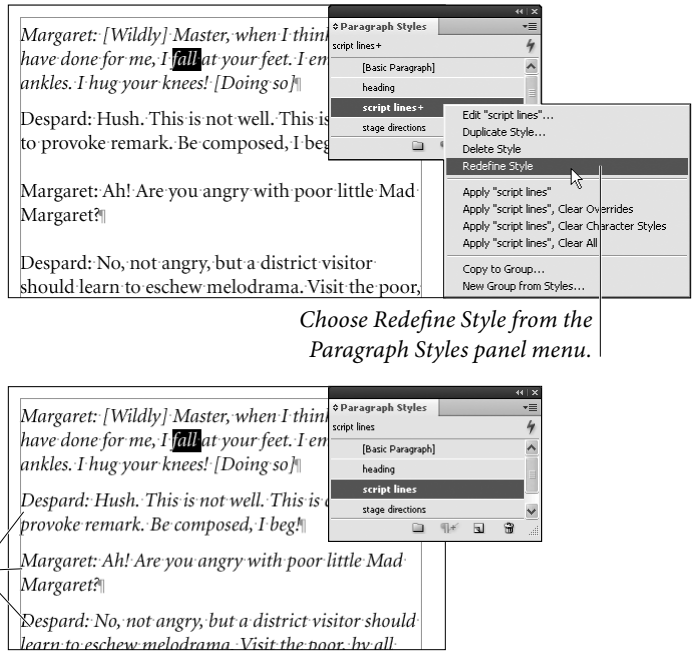
Redefining Paragraph Styles. The easiest way to *create* a paragraph style is to base the style on the formatting of an example paragraph. The easiest way to update the style definition? Do the same!

First, pick any paragraph tagged with the style you want to change, and apply local formatting to it (a "+" will appear next to the style name in the Paragraph Styles panel). Then choose Redefine Style from the Paragraph Styles panel menu (or press Command-Option-Shift-R/Ctrl-Alt-Shift-R, or use the Context menu). InDesign will redefine the style based on the selected text (see Figure 4-65).

Next Style. If you're typing in InDesign, and the paragraph you're in is tagged with the "Heading" style, you probably don't want the

FIGURE 4-65
Redefining a Paragraph Style

Change the formatting of an example paragraph tagged with the paragraph style you want to change. A "+" appears next to the style name in the Paragraph Styles panel.



Choose Redefine Style from the Paragraph Styles panel menu.

InDesign updates all instances of the style with the formatting of the selected paragraph.

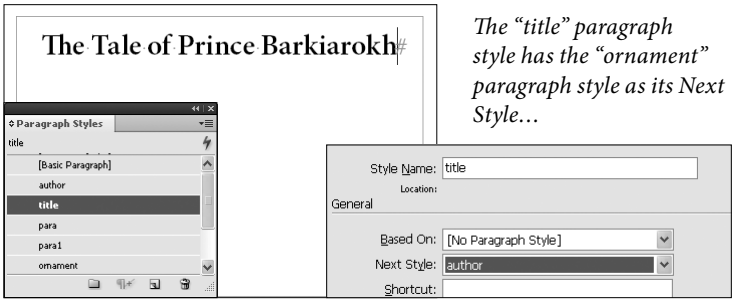
next paragraph to be tagged with "Heading" too, right? You can force InDesign to automatically change the subsequent paragraph style with the Next Style pop-up menu in the New Paragraph Style or Paragraph Style Options dialog box (see Figure 4-66). For example, if you want the subsequent paragraph to be "BodyText," then choose "BodyText" from the Next Style pop-up menu.

Note that this only works if the insertion point is at the end of a paragraph when you press Return/Enter. If the insertion point is anywhere else, you'll simply break that paragraph in two, and both new paragraphs will have the same style as the original one.

Using Next Style on Existing Text. What if you want to apply a sequence of paragraph styles to text you've already entered or imported? Select the range of text you want to format, then point at the first paragraph style you want to apply. Choose Apply *style name*

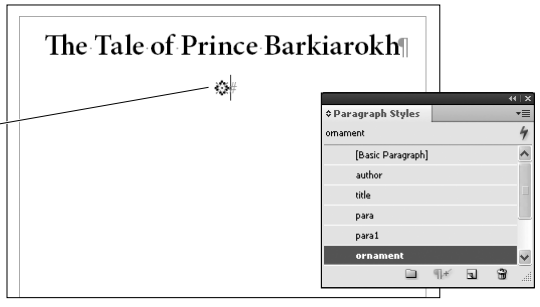
FIGURE 4-66
Next Style

In this example, we have set the Next Style option for each paragraph style to automatically apply the paragraph style we want when we press Return/Enter.



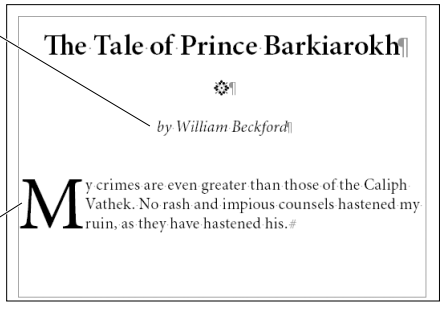
The "title" paragraph style has the "ornament" paragraph style as its Next Style…

…which means that, when we press Return/Enter, InDesign switches to that style.



The "ornament" style, in turn, has the paragraph style named "author" as its next style, so pressing Return/Enter as we type text switches to the "author" style.

When we enter text following the "author" paragraph style, InDesign applies the "para1" style, which includes drop cap formatting.



All of these paragraph style assignments take place as we type, so we don't have to reach for the Paragraph Styles panel.

Then Next Style from the context menu (where *style name* is the name of the style you want to apply). InDesign applies the sequence of paragraph styles (see Figure 4-67).

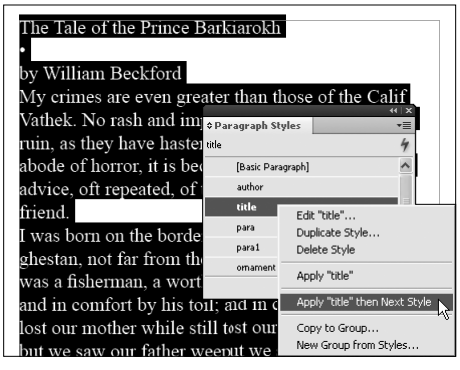
Selecting Unused Paragraph Styles. Choose Select All Unused from the Paragraph Styles panel menu to select all paragraph styles that are not applied to any text in the publication. Typically, the only reason you'd want to do this is to delete them all.

Deleting Paragraph Styles. To remove a paragraph style from your document, first deselect everything (press Command-Shift-A/Ctrl-Shift-A), then select the style name in the Paragraph Styles panel and choose Delete Styles from the panel's menu (or click the Delete Style button at the bottom of the panel). InDesign deletes the style.

InDesign gives you a choice of how to handle paragraphs already tagged with that style. You can choose No Paragraph Style to convert the formatting applied by the style to local formatting, or you can choose to apply another style. If you want to replace one style with another without deleting the original style, use the Find/Change dialog box (see Chapter 3, "Text").

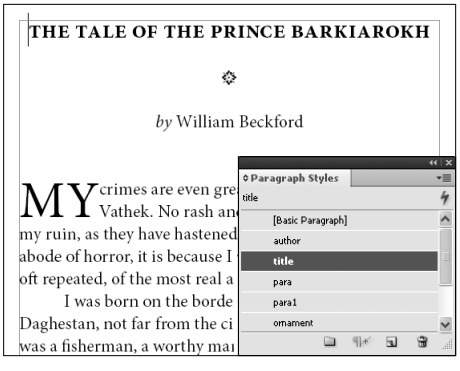
FIGURE 4-67
Applying Sequential Styles

Select the text you want to format. The first paragraph selected should be the start of the "chain" of styles you want to apply.



Choose Apply style name *Then Next Style from the Context menu (where* style name *is the name of the style).*

InDesign applies the styles, formatting each paragraph as specified by the Next Style setting of each style.



Note: You can also apply sequential styles by selecting a text frame with the Selection tool. When you do this, InDesign applies "next style" formatting to all of the text in the story, beginning with the first paragraph in the story.

Paragraph Styles and Nested Styles

As we mentioned in the discussion earlier in this chapter, nested styles really come into their own when combined with paragraph styles. Remember all of the work we did to set up the nested styles in our example? Now imagine putting all of that formatting power into a paragraph style. Imagine applying it with a single mouse click. Again, we think this stuff is very cool (see Figure 4-68).

FIGURE 4-68
Adding Nested Styles to a Paragraph Style

This raw text has been dumped into the document from a spreadsheet or database. Formatting a catalog full of this text would be very tedious, even if you used nested styles as local formatting.

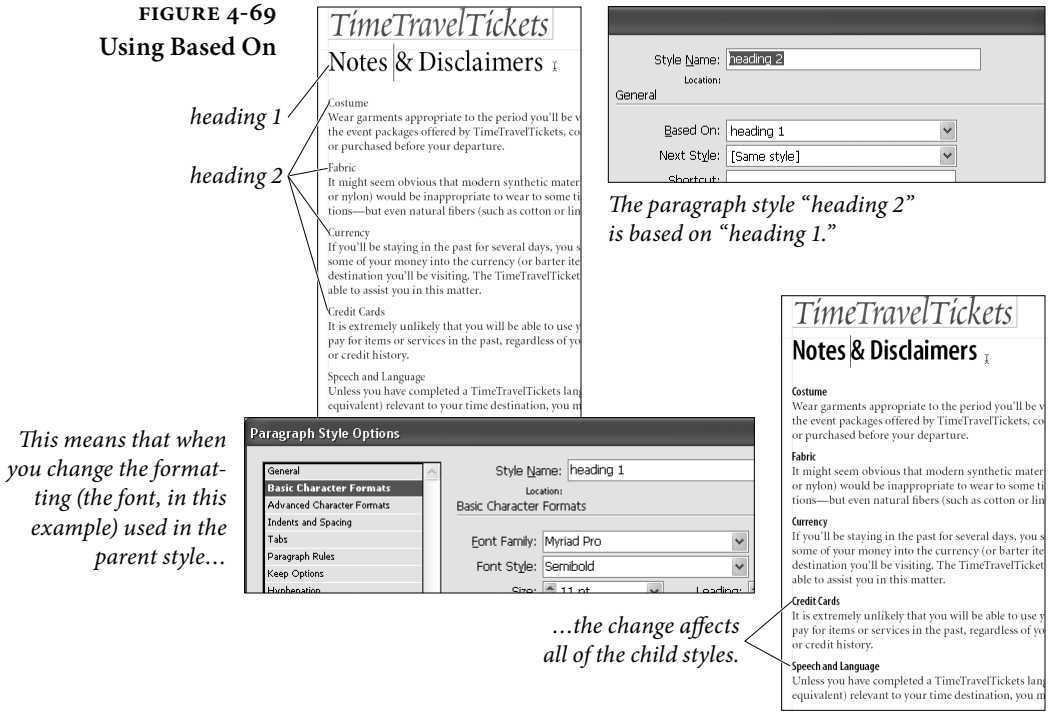
If you add the nested style definitions to a paragraph style, however, you can apply massive amounts of formatting with a single mouse click, as we've done here.

Creating Parent-Child Style Relationships

One powerful feature of InDesign's character and paragraph styles is the ability to base one style on another, also called parent-child relationships (see Figure 4-69). You can base a style on another one by choosing a style from the Based On pop-up menu in either the New Paragraph Style or the Paragraph Style Options dialog box (this works for either character or paragraph styles).

In this book, there are body text styles for paragraphs that follow headings, paragraphs that are in lists, and so on—but they're all based on one "parent" paragraph style. If we need to make the text size a half-point smaller, we could edit the parent style and the change would ripple throughout the book.

FIGURE 4-69
Using Based On



When one style is based on another, InDesign keeps track of the differences between the base style (the "parent") and the style based on it (the "child"). When you change the definition of the parent style, the changes will affect all of the attributes in the child style that are the same as the same attributes in the parent style.

Reset to Base. By the way, if your text cursor is in a paragraph when you create a new style, that paragraph's style becomes the "based on" style and any local formatting applied to the paragraph appears as the differences in the new style. If you don't want the local formatting, click the Reset to Base button. If you don't want your new style to be based on anything, make sure the Based On pop-up menu is set to No Paragraph Style.

Style Groups

Style Groups are a way to organize your paragraph and character styles. (They work with object styles and table styles, too, but that's not what we're talking about in this chapter.) Each style group is a folder into which you can put one or more styles. You can even nest one style group into another to create style hierarchies.

To create a style group, click the New Style Group button at the bottom of the Paragraph Styles or Character Styles panel (or choose the feature of the same name from the panel's menu). If you already

know which of your styles you want in your group, you can add them while creating the group by first selecting them first (see Figure 4-70).

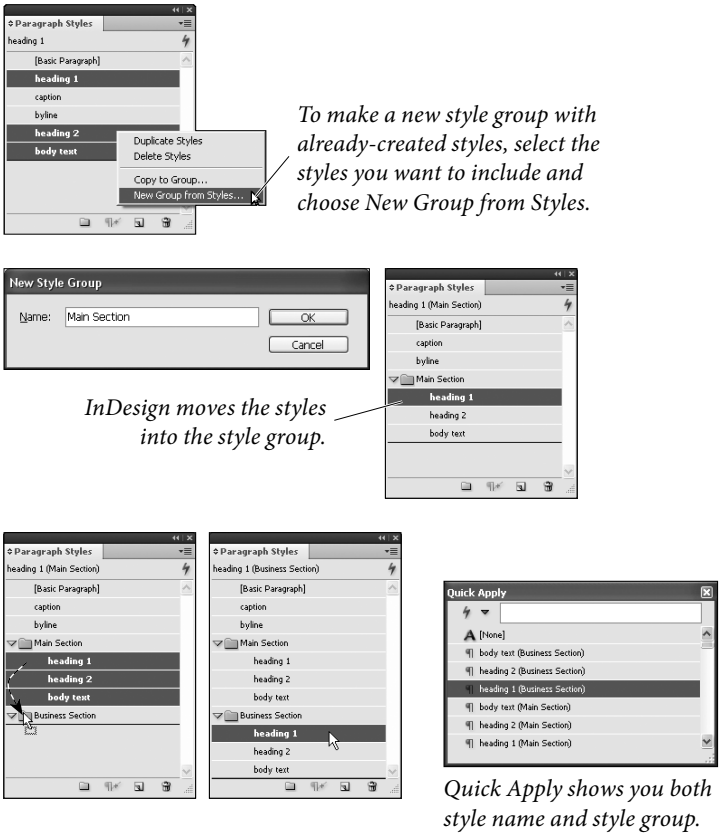
Once you've created a style group, you can move any style into it by dragging the style name in the panel into the group. It's very similar to working with folders in your operating system.

One of the coolest things about style groups is that you can have the same-named styles in more than one group. For example, you might make a "bodytext" paragraph style in a group called "Business Section" and another, differently-styled "bodytext" style in a group called "Entertainment Section". We're not saying you have to create templates like this, but it can be useful in certain situations.

To copy one or more selected styles to another group, choose Copy to Group from the panel menu, or Option/Alt-drag them over another folder.

What's Wrong with Style Groups? At first, style groups sound great, especially if you have dozens of styles in your document. But you need to be careful with them. First, if do have same-named styles

FIGURE 4-70
Creating Style Groups



with different definitions, it can be confusing *which* bodytext or *which* heading you're applying. This calls for eternal vigilance. It helps if you apply styles with Quick Apply, because the Quick Apply window displays both the style name and what style group its in.

The big problems appear if you need to export your documents as RTF (rich text format) for someone who is editing in Microsoft Word. Style groups will cause huge headaches because on export InDesign changes the style names (it adds the style group name). This isn't so bad except that when you reimport the RTF file, it's not smart enough to remap the style names back to the document's styles, so you end up with all your styles duplicated. It's horrible. We hope that Adobe will release a patch to fix this problem by the time you read this, but we're not holding our breath. Of course, in the meantime, it's a good excuse to get your editors to use InCopy instead.

Copying Styles from Other Publications

One of the great things about character and paragraph styles is that you can use them to unify standard formatting across a range of publications—the chapters of this book, for example. While you can't define a "master" style sheet and have all publications get their style definitions from it (as you can in FrameMaker), you can easily copy styles from one InDesign publication to another.

- To copy character styles from another publication, choose Load Character Styles from the Character Styles panel menu. InDesign displays the Open a File dialog box. Locate and select the InDesign publication file containing the styles you want and click the Open button. InDesign copies the character styles from that publication into the current document.
- To copy paragraph styles from one publication to another choose Load Paragraph Styles from the Paragraph Styles panel menu.
- To import both character and paragraph styles from another publication, choose Load All Text Styles from the panel menu of the Character Styles panel or the Paragraph Styles panel.

When you import styles that have the same name as styles that already exist in the publication, InDesign overrides the attributes of the existing styles with the attributes of the incoming styles.

You can also move styles by copying text tagged with the styles you want from one publication and pasting it into another document

(or dragging a text frame from one document into another). If the styles do not exist in the document you've pasted the text into, InDesign adds them. If the styles already exist, InDesign overrides the style definitions in the incoming text with the style definitions of the existing styles.

You can also synchronize style sheets among all the documents in a book when you use the Book panel, which we talk about in Chapter 8, "Long Documents."

Styles from imported text files. When you import a Microsoft Word or RTF file that includes paragraph or character styles that don't exist in the InDesign publication, those styles get added to the Character Styles and Paragraph Styles panels. You can always tell one of these styles from those created in InDesign because the panels display a little gray floppy disk icon next to the style name.

Libraries of Styles. One of our favorite uses for libraries (see "Library panel" in Chapter 1, "Workspace") is to save paragraph and character styles that we use in multiple documents. In a small text frame, we type a few words (usually the name of the style) and then apply one or more styles to them. Then we drag the text frame into a library (select Library from the New submenu, under the File menu, if you haven't already made one) and double-click on the library thumbnail to give it a name and description. Later, when we need that style in some other document, we can open the library file, drag that text frame into our document, and then delete the text frame—the styles remain. Of course, this works with libraries of color swatches, too.

Styles from alternate layouts. When you create an alternate layout, you can select the "Copy Text Styles to New Styles Group" option. This creates all the text styles in a new styles group so that you can easily change the styles to conform to the different layout. In fact, you even go back and base the styles in the child layout on the styles in the parent layout to establish a connection (see "Alternate Layouts" in Chapter 2, "Page Layout").

Mapped styles from Content Placer tool. When you use the Content Collector/Content Placer tools to copy objects from one publication to another, you can specify style mapping options for text and table styles (see "Copying and Linking Objects" in Chapter 7, "Importing and Exporting").

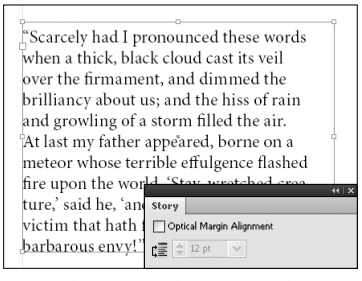
Optical Margin Alignment

Ever since Gutenberg set out to print his Bible, typesetters have looked for ways to "balance" the edges of columns of text—particularly lines ending or beginning with punctuation. Because the eye doesn't "see" punctuation, it can sometimes appear that the left or right edges of some columns of type (especially justified type) are misaligned. Some other programs compensate for this problem by using a "hanging punctuation" feature, which pushes certain punctuation characters outside the text column. But there's more to making the edges of a column look even than just punctuation. Some characters can create a "ragged" look all by themselves—think of a "W," at the beginning of a line, for example.

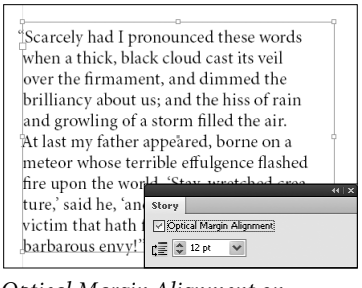
When you select an InDesign story (with either the Selection or the Type tool) and turn on the Optical Margin Alignment option in the Story panel (choose Story from the Type menu to display the Story panel), the program balances the edges of the columns based on the appearance of *all* of the characters at the beginning or end of the lines in the column. This adjustment makes the columns appear more even—even though it sometimes means that characters are extending *beyond* the edges of the column (see Figure 4-71).

The amount that InDesign "hangs" a character outside the text column depends on the setting you enter in the Base Size field of

FIGURE 4-71
Optical Margin Alignment

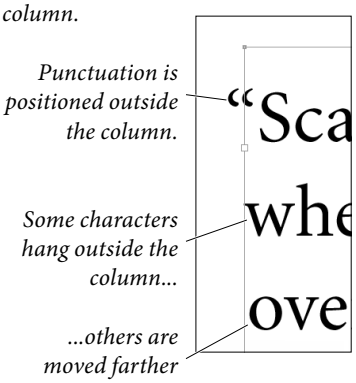


Optical Margin Alignment off



Optical Margin Alignment on

In this close-up view, you can clearly see the way that InDesign adjusts the characters at the edge of the text column.



Punctuation is positioned outside the column.

Some characters hang outside the column...

...others are moved farther inside the column.

the Story panel (that's the field with the icon that looks like it would make a drop cap). In general, you should enter the point size of your body text in this field.

Unfortunately, it turns out that many designers don't like the look of Optical Margin Alignment. It's not that the feature is flawed; it's that designers (especially younger folks) have become so accustomed to their type lining up with a particular guide or ruler that they think it's wrong to have type inside or outside that (non-printing) line. Nevertheless, we encourage you to try turning it on and seeing how your readers like it—we think they'll find the text easier to read.

Ignore Optical Margin. Even if you do like Optical Margin Alignment, there's a good chance that you'll occasionally find a paragraph or two that you wish it wouldn't apply to. For example, monospaced code listings should not be optically aligned—that defeats the purpose of using a monospaced font. Fortunately, you have the option to turn off Optical Margin Alignment on a paragraph by paragraph basis or in a paragraph style.

To turn it off for one or more selected paragraphs, choose Ignore Optical Margin from the Control panel or Paragraph panel menu. To disable it in a paragraph style, turn on the Ignore Optical Margin checkbox in the Indents and Spacing pane of the Paragraph Style Options dialog box.

An Old Typesetter Never…

Late night. The sound of the espresso machine in the kitchen about to reach critical mass and melt down, destroying the office and civilization as we know it. The office is different, the equipment and the coffee are better, but we still seem to be up late at night setting type.

And, to tell you the truth, we're not sure we would have it any other way.

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