#3: Customizing Keyboard Shortcuts

InDesign provides hundreds of keyboard shortcuts to streamline your work. The shortcuts do you little good, however, if you can't remember them. Fortunately, you can change the keyboard shortcuts to better suit the type of work you do and your manual dexterity. For example, if you frequently use the Change Case commands or the Fill with Placeholder Text command in the Type menu, you can create keyboard shortcuts for those commands. Or, if a command you use frequently has a finger-contorting shortcut, you can replace it with an easier one.

InDesign stores keyboard shortcuts in sets. You can create your own sets of keyboard shortcuts and select a different set at any time while you're working.

Selecting a Shortcut Set

To specify a shortcut set for use with InDesign, choose Edit > Keyboard Shortcuts. Choose an option from the Set menu. If you're familiar with QuarkXPress 4 or PageMaker 7, you can use that program's keyboard shortcuts for similar features. The selected shortcut set is in use for your copy of InDesign—it is *not* saved with the active document.

Editing Shortcut Sets

You can edit the shortcuts for any command in any set—even the Default, QuarkXPress 4, and PageMaker 7 sets. However, it's a good idea to keep these default sets intact. Instead of editing them, create a new set based on one of them, and then edit it. To edit shortcut sets:

1. Choose Edit > Keyboard Shortcuts.

2. Click New Set. Enter a name for the set and choose an option from the Based on Set menu to specify a source for the initial list of keyboard shortcuts. You can also choose an existing set to edit from the Set menu.

3. To locate the command whose shortcut you want to edit, choose an option from the Product Area menu. For example, if the command is in the Type menu, choose Type Menu.

4. Scroll through the Commands list to locate the individual command and select it. For example, if you want to edit the Show Hidden Characters shortcut, select it (**Figure 3**).

Longer publications, such as books and magazines, generally consist of one document per chapter or article. InDesign's book features let you combine the documents so that you can track page numbers across chapters; create tables of contents, indexes, and footnotes; globally update styles; and output the book as one file.

11 | Working with Long Documents

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

- Combine multiple InDesign documents into a book file.
- Control page numbering across documents in a book.
- Create text variables for running headers or footers.
- Add footnotes.
- Specify a source document for defining a book's styles.
- Create a table of contents and index for a book.

Getting started

In this lesson, you'll combine several documents into an InDesign book file. A book file allows you to perform many functions across all the documents—such as creating a table of contents or updating styles—while retaining the ability to open and edit each document individually. The four sample documents you'll work with consist of the table of contents, first chapter, second chapter, and index from an 11-chapter book. The skills you learn in this lesson apply to book files consisting of any number of documents.

Note: If you have not already copied the resource files for this lesson onto your hard disk from the Adobe InDesign CS3 Classroom in a Book CD, do so now. See "Copying the Classroom in a Book files" on page 2.

1   To ensure that the tools and panels function exactly as described in this lesson, delete or reset the InDesign CS3 default preferences following the procedure in "Saving, deleting, and restoring preference files" on page 2.

2   Start Adobe InDesign CS3.

Starting a book

In InDesign, a book is a special type of file that displays as a panel, much like a library. The Book panel displays the documents you add to the book and provides quick access to most book-related functions. In this section, you will create a book file, add documents, and specify the page numbering across the book.

Creating a book file

Before starting a book, it's a good idea to collect all of the InDesign documents for the book into a single folder for the project. This folder is also a good place to store all the fonts, graphic files, libraries, color profiles, and other files required for the publication.

In this exercise, the InDesign documents are already stored in the lesson folder. You will create a new book file and store it in the lesson folder.

1   Choose File > New > Book.

Note: You open and close book files the same way you open and close libraries. Use File > Open to open the book, and click the panel's close button to close a book.

2   In the New Book dialog box, navigate to the Lesson_11 folder. Type **HowTos.indb** in the Save As box. The new Book panel appears.

3   Position the Book panel in the center of your screen.

Adding documents to a book file

The Book panel displays a link to each document in the book—it does not literally contain the documents. You can add documents one at a time, as they become available, or all at once. If you start with a few documents and add more documents later, you can always change the order of the documents and update the page numbering, styles, the table of contents, index, and more as necessary. In this exercise, you will add all four book chapters at once.

1   Click the Add Documents button ( ) at the bottom of the Book panel.

2   In the Add Documents dialog box, navigate to the Lesson_11 folder. Select all four InDesign files. You can select a range of contiguous files by Shift-clicking the first file and the last file.

**3**   Click Open to display the documents in the Book panel.
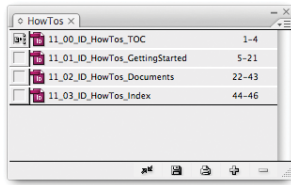
4 Choose Save Book from the Book panel menu.

Specifying page numbering across the book

InDesign's book feature can automatically track page numbering across multiple documents in a book. You can override the page numbering as necessary by changing the numbering options for a document or creating a new section within a document.

In this part of the lesson, you will specify page numbering options to ensure continuous, up-to-date page numbers as chapters are added or rearranged.

1 Notice the page numbering shown next to each chapter in the Book panel.

2 Choose Book Page Numbering Options from the Book panel menu.

3 In the Book Page Numbering Options dialog box, select Continue On Next Odd Page.

4 Select Insert Blank Page to ensure that each chapter ends on a left-facing page. If a chapter ends on a right-facing page, a blank page is automatically added.

5 If necessary, select Automatically Update Page & Section Numbers to keep page numbers updated across the book.
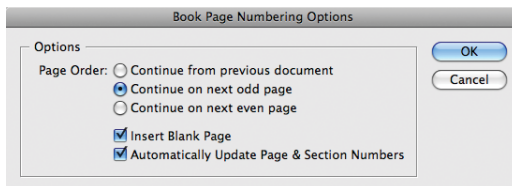
6 Click OK. Choose Save Book from the Book panel menu.

Customizing page numbering

At this point, page numbering is set from the first page in the first chapter of the book to the last chapter. The first chapter in the book, containing the table of contents, should
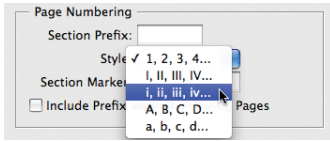
use roman numerals. The second chapter in the book, containing the Getting Started chapter, should start on page 1.

1 In the Book panel, click to select the first chapter: 11_00_ID_HowTos_TOC.

2 Choose Document Numbering Options from the Book panel menu.

This opens the chapter and displays the Document Numbering Options dialog box.

3 Under Page Numbering, choose the lowercase roman numerals (i, ii, iii, iv) from the Style menu.

Typically, front-matter pages, such as the table of contents, are numbered with roman numerals.

4 Click OK. Choose File > Save and close the document.

5 In the Book panel, click to select the second chapter: 11_01_ID_HowTos_GettingStarted.

6 Choose Document Numbering Options from the Book panel menu.

7 In the Document Numbering Options dialog box, select Start Page Numbering At, and then type 1 in the text box.

8 Make sure that arabic numerals (1, 2, 3, 4) are selected in the Style menu.

9 Click OK. Choose File > Save, then leave this document open for the next lesson.

10 Review the book page numbering now. The first document, containing the table of contents, is now numbered i–iv with the remaining documents starting on page 1 and continuing to the end.

Creating a running footer

A running header or footer is text that repeats on chapter pages—such as the chapter number in the header and the chapter title in the footer. InDesign can automatically fill in the text for a running footer according to a chapter's title. To do this, you create a text variable for the source text, in this case the chapter title. You then place the text variable on the master page in the footer (or wherever you want it to appear in the document).

Defining a text variable

First, you'll create a text variable for the chapter title.

1   With 11_01_ID_HowTos_GettingStarted still open, double-click the page 1 icon in the Pages panel to center the page in the document window.

2   Choose Type > Paragraph Styles to open the Paragraph Styles panel.

3   Using the Type tool (т), click in the chapter title "Getting Started with InDesign" to see the paragraph style applied to it: Chapter Title.

You will use this information to create the text variable, which will specify that text using the Chapter Title paragraph style will be placed in the footer.
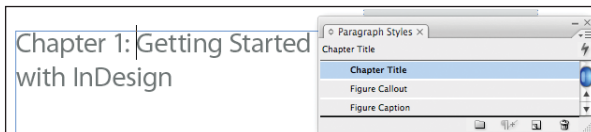
4   Close the Paragraph Styles panel.

5   Choose Type > Text Variables > Define. In the Text Variables dialog box, click New.

6   Type **Chapter Title for Footer** in the Name box.

Now you will specify that you want text formatted with a specific paragraph style to be used for a running header (or in this case, a running footer).

7   Choose Running Header (Paragraph Style) from the Type menu.

From the list of paragraph styles in the document, you will choose the paragraph style that is applied to the chapter title.

8   Choose Chapter Title from the Style menu.
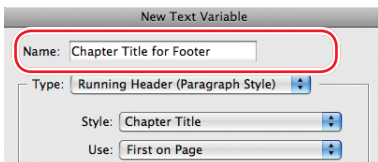
9   Leave all the other settings at the defaults, and click OK. The new text variable appears in the list of variables. Click Done to close the Text Variables dialog box.

Inserting a text variable

Now that you've created the text variable, you can insert it on the master page (or anywhere in the document).

1   Click the page number menu in the lower-left of the document window. Scroll down to the master pages, and choose T-Text to display the T-Text master page.

2   Choose Type > Show Hidden Characters, so that you can see where to place the text variable.

3   Zoom in on the lower-left corner of the left-facing master page.

4   Using the Type tool, click to place the text insertion point after the tab character (>>). This is where you will place the variable.

5   Choose Type > Text Variables > Insert Variable > Chapter Title for Footer.

6   From the page number menu in the lower-left document window, choose 2.

On page 2, notice how the chapter title is now placed in the running footer.

7   Choose File > Save. Leave the document open for the next part of the lesson.

Each chapter in the book can use the same text variable but have a different running footer according to its chapter title.

Adding a footnote

With InDesign, you can create footnotes or import them from text imported as a Microsoft Word document or as a rich-text format (RTF) file. In the latter case, InDesign automatically creates and places the footnotes, which you can then fine-tune in the Document Footnote Options dialog box. If you're working with a book file, you can specify whether footnote numbering restarts with each document or continues from document to document. In this exercise, you will add a footnote and customize its formatting.

1   With the 11_01_ID_HowTos_GettingStarted chapter open, choose page 11 from the page menu in the lower-left of the document window.

2   Zoom to see the main body paragraph, starting with "To reduce the size."

3   Using the Type tool (T), select the second to last sentence in the paragraph, starting with "For example."

(**Figure 5d**). Click the arrow next to a category of controls (such as Charac-ter) to see all the options (such as Fonts, Kerning, Style, etc.) and uncheck any options you want to hide. For example, if you're not using Adobe Bridge, you can uncheck it to remove that button from the Control panel. When you're finished, click OK.¶

4   Choose Edit > Cut. This text will be used in a footnote rather than in the body of the text.

5   Position the text insertion point just after "hide." Then choose Type > Insert Footnote.

A footnote reference number appears in the text. In addition, a footnote text frame and placeholder appear at the bottom of the page, along with the blinking text insertion point to the right of the footnote number.
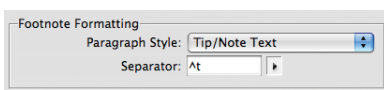
6   Choose Edit > Paste. Leave the text insertion point in the footnote.

1   »   For example, if you're not using Adobe Bridge, you can uncheck it to remove that button from the Control panel.#

7   Choose Type > Document Footnote Options.

Notice all the options for customizing the footnote numbering and formatting. Here you can control the numbering style and appearance of the footnote reference numbers and footnote text throughout a document.

8   At the bottom of the Footnote Options dialog box under Footnote Formatting, choose Tip/Note Text from the Paragraph Style menu. Select Preview to see the change to the footnote text formatting.

Footnote Formatting
Paragraph Style: Tip/Note Text
Separator: ^t

9 Click the Layout tab to view all the options for customizing the placement and formatting of footnotes throughout a document. Leave all settings at the defaults.

10 Click OK to format the footnote.

11 Choose File > Save. Leave the chapter open for the next part of the lesson.

1 » For example, if you're not using Adobe Bridge, you can uncheck it to remove that button from the Control panel.#

Synchronizing a book

To maintain consistency across the documents in a book file, InDesign allows you to specify a source document for specifications such as paragraph styles, color swatches, object styles, text variables, and master pages. You can then synchronize selected documents with the source document.

In this exercise, you will add a color swatch to a chapter, use the new color in a paragraph style, and then synchronize the book so that the color is used consistently.

1 With 11_01_ID_HowTos_GettingStarted open, choose View > Fit Page in Window. It does not matter which page is displayed.

2 Choose Window > Swatches to open the Swatches panel.

3 Choose New Color Swatch from the Swatches panel menu.

4 From the Color Mode menu, choose Pantone Process Coated.

5 Type **73-1** in the Pantone DS box (or scroll to locate and select the color).

6 Click OK to add the color and close the New Color Swatch dialog box.

7 Choose Type > Paragraph Styles to open the Paragraph Styles panel. Click the pasteboard to make sure that nothing is selected.

8 Double-click Head 1 to edit the style. From the categories on the left side of the Paragraph Style Options dialog box, select Character Color.

9 To the right under Character Color, click the new PANTONE DS 73-1 C swatch. Leave the Tint set at 70%.

10 Click OK to update the paragraph style, then navigate to page 10 to see the change. Choose File > Save to save the change with the document.

You now need to specify that the current chapter, Getting Started, is the Style Source document in the book.

11 In the Book panel to the left of the 11_01_ID_HowTos_GettingStarted chapter name, click in the blank box to specify this document as the book's Style Source.
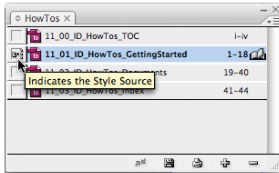
Now you will select the chapters you want to synchronize—in this case, all of them.

12 Shift-click the first chapter and last chapter in the Book panel to select all the chapters in the book.

13 At the bottom of the Book panel, click the Synchronize Book button ( ). At the alert indicating the process has completed, click OK.

14 Choose Save Book from the Book panel menu.

15 Double-click another chapter to open it. Notice the new swatches in the Swatches panel; this color is now applied to text that is formatted with the Head 1 style. Save and close all chapters.

Generating a table of contents

With InDesign, you can generate a fully formatted table of contents with accurate page numbers for a single document or all the documents in a book file. The feature works by copying text formatted with specific paragraph styles, compiling the text in order, and then reformatting the text with new paragraph styles. You can use this feature to create any type of list based on text formatted with specific paragraph styles. The list can be alphabetical and does not need to include page numbers.

Preparing to generate the table of contents

To generate a table of contents, you need to know what paragraph styles are applied to the text that will go in the table of contents. You also need to create paragraph styles to format the text in the table of contents. Now you will open a chapter to study its paragraph styles and open the table of contents chapter to see how it is formatted.

1 In the Book panel, double-click 11_01_ID_HowTos_GettingStarted to open the chapter.

2 Choose Type > Paragraph Styles to open the Paragraph Styles panel.

3 On page 1 of the Getting Started chapter, click in the chapter title. In the Paragraph Styles panel, notice the Chapter Title paragraph style is applied.

4 On page 2 of the chapter, click in the numbered section name. In the Paragraph Styles panel, notice the Head 1 paragraph style is applied.
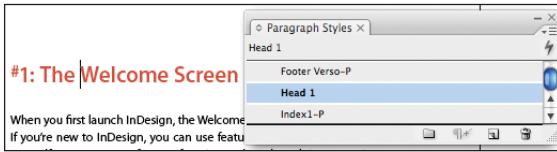

5 Close the Getting Started chapter; then double-click 11_00_ID_HowTos_TOC in the Book panel to open it.

6 With the Paragraph Styles panel open, use the Type tool (T) to click in the three different types of formatting you see on the page:

• TOC Title paragraph style is applied to the name of the table of contents (Contents).

• TOC Chapter Title is applied to the first-level heads, the chapter names.

• TOC Section Name is applied to the second-level heads, the numbered section names.

7 Choose Edit > Select All. Then press Backspace or Delete to delete the table of contents.

You are going to generate your own table of contents in the next two exercises.

8 Choose File > Save.

Setting up the table of contents

Now that you are familiar with all the paragraph styles that will be used to generate the table of contents, you will "map" them in the Table of Contents dialog box. In this exercise, you will specify the title, what paragraph styles to include, and how to format the final table of contents.

1 Choose Layout > Table of Contents.

2   In the Table of Contents dialog box, type **Contents** in the Title box if necessary. This is the title that will appear above the table of contents.

3   To specify how the title is formatted, choose TOC Title from the Style menu.

4   Under Styles In Table Of Contents, scroll through the Other Styles list box at right to locate Chapter Title. Select it and click Add.

5   Repeat step 4 to locate and select Head 1. Click Add. Leave the dialog box open.

Now that you have specified what text needs to go in the table of contents—text formatted with Chapter Title followed by Head 1—you will specify how it should look in the table of contents.

6   On the left side of the Table of Contents dialog box in the Include Paragraph Styles list box, select Chapter Title. Under Style: Chapter Title, choose TOC Chapter Title from the Entry Style menu.
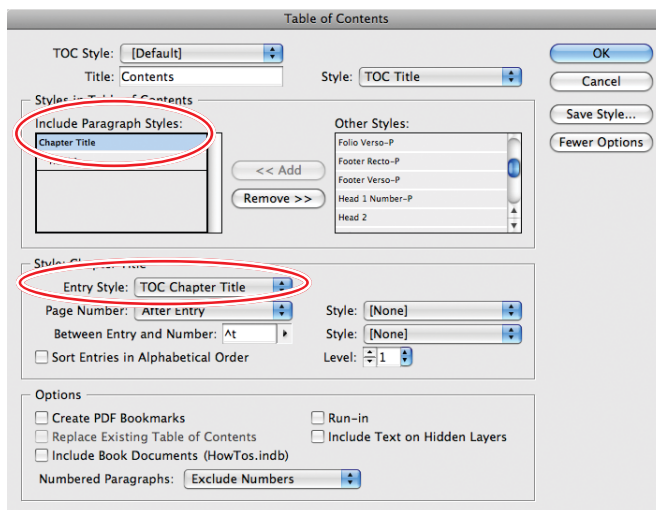
7   In the Include Paragraph Styles list box, select Head 1. Under Style: Head 1, select TOC Section Name from the Entry Style menu.

8   Under Options at the bottom of the dialog box, Select Include Book Documents to generate a table of contents for all the chapters in the book file.

9   Click OK. This loads the pointer with the table of contents text.

Flowing the table of contents

You flow the table of contents text the same way you flow other imported text. You can either click in an existing text frame or drag to create a new text frame.

1   Click in the frame that held the sample table of contents. The table of contents flows into the text frame.

2   Choose File > Save and close the document.

3   From the Book panel menu, choose Save Book. This saves all changes made to the book file.

Indexing a book

To create an index in InDesign, you apply nonprinting tags to text. The tags indicate the index topic—the text that shows up in the index. The tags also indicate the reference— the range of pages or cross reference that shows up in the index. You can create up to a four-level index with cross references for an individual document or for a book file. When you generate the index, InDesign applies paragraph and character styles, and inserts punctuation. While indexing is an editorial skill that requires special training, designers can create simple indexes and generate an index from tagged text.

In this exercise, you will add a few index topics and references, and then generate a partial index for the book.

Adding index topics and references

An index reference is what an index entry refers you to—a page-number reference or another entry, such as a "see also" reference. The first time you add an index reference, the index entry is added as well. Now you will view existing index entries in a chapter and add two topics with references.

1   In the Book panel, double-click 11_01_ID_HowTos_GettingStarted to open the chapter. Zoom in on the first paragraph of the first page.

2   Choose Window > Type & Tables > Index to open the Index panel.

3   Note the index markers ⌃ in the text, and the topics listed in the Index panel. Click the arrows in the Index panel to see the topics.

4   Navigate to page 5 of the document and zoom as necessary to see the bulleted list.

5   Using the Type tool (T), select the words "Type pane" in the first bullet.

6   Make sure that Reference is selected in the Index panel; then choose New Page Reference from the Index panel menu.
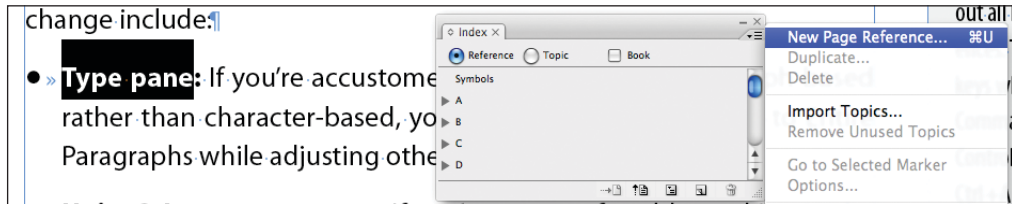
7   In the New Page Reference dialog box under Type, make sure that Current Page is selected in the menu.

The options in the Type menu indicate what text this reference to the index topic covers—and therefore, what page numbers to list. A common choice to indicate that the topic changes with the next subhead is To Next Style Change.
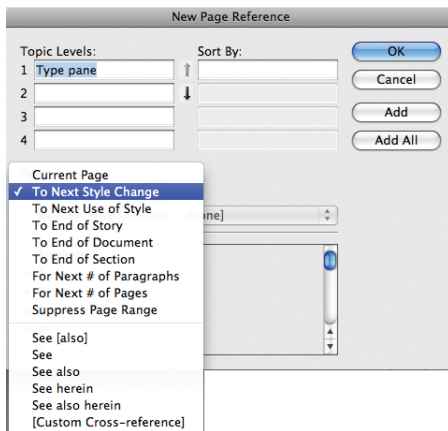
8   Click OK to add the index topic and a reference to the current page. In the Index panel, scroll down to the T section. Click the arrow next to T to see the page reference.

9   Using the Type tool, select the words "Units & Increments pane" in the second bullet. Choose New Page Reference from the Index panel menu.

10   Click the down arrow next to "Units & Increments pane" in the 1 Topic Levels box. This moves the index entry down to a second-level index topic.

11   In the list box at the bottom of the dialog box, locate the "P" heading and click the arrow next to it. Double-click Preferences to make it the first-level index topic.

12   Click OK to add the second-level topic and the reference.
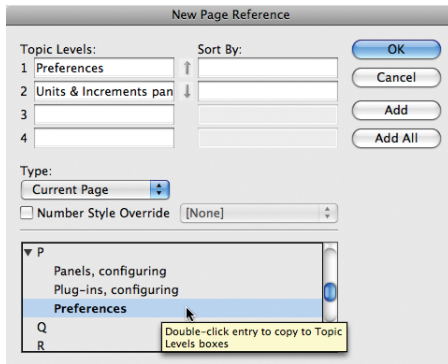
13   Choose File > Save.

Generating an index

As with a table of contents, when you generate an index you need to specify paragraph styles. You can also fine-tune the index with character styles and custom punctuation. InDesign provides default styles for the index, but you will generally use styles set up for a book's template.

In this exercise, you will review the styles in a sample index, view the index for a book, and generate the formatted index.

1   In the Book panel, double-click 11_03_ID_HowTos_Index to open the index chapter.

2   In the Index panel, click Book in the upper-right corner to display the index for all chapters in the book.

3   Choose Type > Paragraph Styles. Using the Type tool (T), click in the four different types of formatting you see on the page containing the index:

•   Chapter Title is applied to the heading "Index" at the top of the page.

•   Index Letter-P is applied to the letter headings: A, B, C, and so on.

•   Index 1-P is applied to the first-level topics.

•   Index 2-P is applied to the second-level topics.

4   Using the Type tool (T), click in the text frame containing the sample index. You'll delete the sample index so that you can generate an updated one.

5   Choose Edit > Select All, and then press Backspace or Delete. Leave the text insertion point in the text frame.

6   In the Index panel, choose Generate Index from the panel menu.

7   In the Generate Index dialog box, delete the highlighted word "Index" in the Title box. The title is already placed on the page in a different text frame.

8   Click More Options to see all the index controls.

9   At the top of the dialog box, select Include Book Documents to compile the index from all the chapters.

10   Select Include Index Section Headings to add letter headings: A, B, C, and so on.

11   On the right side of the dialog box under Index Style, choose Index Letter-P from the Section Heading menu. This specifies the formatting of the letter headings.

12   Under Level Style, choose Index1-P for Level 1 and Index2-P for Level 2 to specify the paragraph styles applied to the various levels of entries in the index.

13   At the bottom of the dialog box under Entry Separators, select the Following Topic box and type a **comma and a space** (be sure to replaces the default separators, two word spaces). This specifies the punctuation inserted after an index topic and the first reference.

14   Click OK to close the Generate Index dialog box.

Next you'll flow the index into the text frame.
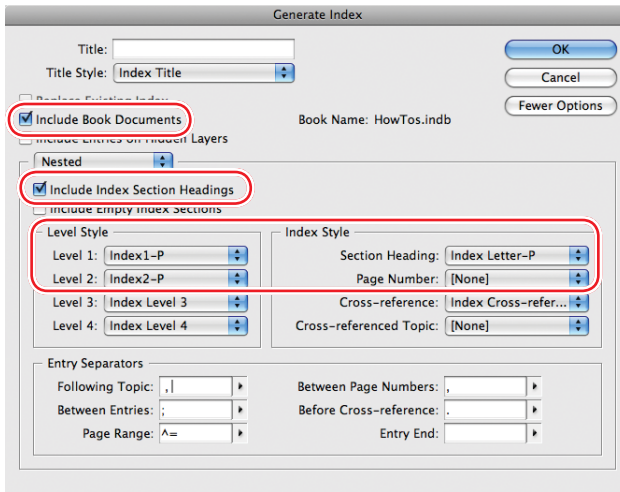
15 Click the loaded pointer in the main text frame to flow the index. Choose > Screen Mode > Preview to view the completed index.

Note: *Your index may look different, depending on your fonts.*

16 Choose File > Save and close the document.

Congratulations. You have completed the lesson.

Exploring on your own

To experiment more with long-document features, try the following:

• Add and delete pages from one of the documents in a book file to see how the page numbers in the Book panel automatically update.

• Add a new footnote and experiment with the layout and formatting controls.

• Generate a list other than a table of contents. For example, you can compile a list of tips in the book from the text formatted with the Sidebar Head paragraph style.

• Add more index topics and references at various levels.

Review

Review questions

1   What are the advantages of using the book feature?

2   Describe the process and results of moving a chapter file in a book.

3   Why go to the trouble of creating an automatic table of contents or index?

4   How do you create running headers and footers?

Review answers

1   The book feature allows you to combine multiple documents into a single publication with the appropriate page numbering and a complete table of contents and index. You can also output multiple files in one step.

2   To move a file in a book, select it in the Book panel and drag it up or down. The book repaginates as necessary.

3   The automatic table of contents and index features require some thought and setup, but are automatically formatted, accurate, and easy to update.

4   Use the Running Header text variable on a master page to create a running header or footer. The text on each document page updates according to the text variable's definition.