

## Chapter 1

# Customizing

“Creative efficiency.” If you read the refreshingly short introduction a few pages previous, you know that I believe the phrase “creative efficiency” to be among the most important ideals of our profession of designing for, or placing, ink on paper. To realize your creative potential, to enable the creatives working under you to realize their creative potential, you must minimize the impact of your tools on the process of creating. Accomplishing that requires modifying tools like InDesign, making *them* emulate how *you* work as much as possible. Software—computers in general—are far from the point where they will truly work the way humans work, the way humans think. We are still forced to conform our methodologies and thinking processes to fit within the narrow boxes sitting under our desks—to a point. Whenever possible—and, with InDesign CS3, much is possible—customize the software to fit your work and preferences as closely as you can.

While the idea of rearranging palettes or modifying menus may seem superfluous compared with other topics in this book, I’ve placed this chapter first because, ultimately, how you customize InDesign directly affects how efficiently you use the page layout application to learn and use anything else you might read in this volume.

Customizing InDesign shifts that dividing line between the software working for you and you working for the software further toward the former.

In this chapter, you will learn to:

- ◆ Organize panels and use the new panel docks
- ◆ Customize keyboard shortcuts
- ◆ Customize and color-code menus
- ◆ Remove parts of InDesign to create lean, workflow-specific installations
- ◆ Change the default font, colors, and more
- ◆ Carry your personalized InDesign work environment in your pocket or on your iPod

## Panels

Ever since April 2005, when Adobe and Macromedia announced their intent to merge, users of InDesign or any of either company’s products have speculated about the user interface that would result from combining two of the most acclaimed user interface design teams in the business. Creative Suite 3 is that result—the New Adobe UI—and it’s highly customizable.

No longer constricted by the settlement terms of lawsuits lost against one another in the late Nineties and early Oughties, the newly joined Adobe and Macromedia are free to make use of the best user interface innovations from both companies. The freedom of Adobe applications' floating palettes and Macromedia applications' cleanly organized, nonfloating panel bars have converged in Creative Suite 3 to create more choices in workspace arrangement than any application has ever offered. To reflect the change, *palettes* are now called *panels*, and they can be free-floating, tabbed, stacked, grouped together into vertical panel bars à la Macromedia applications, and condensed into narrow icon and title tiles. Given the fact that InDesign CS3 has an unprecedented 41 panels, you'll likely employ several panel arrangement forms concurrently.

Hands down, the most efficient way to organize the InDesign workspace is across dual monitors—preferably monitors of the same size and resolution. Although the vast majority of users don't need all 41 panels opened at once, many panels—such as Layers, Pages, Swatches, Navigator, Index, Hyperlinks, Scripts, Links, and the five styles panels—tend to grow in utility and convenience according to their heights (or height and width in the case of the Navigator panel). The more space you give such panels, the less scrolling you'll have to do, which means the faster you can access the layer, page, swatch, style, or whatever it is you need. On my primary production computer, I use two monitors, with the left containing the InDesign application itself and the Control and Tools panels and the right completely filled with all other panels. Of course, not even an entire monitor can contain all 41 panels simultaneously—not expanded panels, anyway. Maybe if you ran *three* monitors...

The point is, Adobe knows that InDesign is a forest of panels. The vast majority of the application's functions are contained on panels, which is a far more efficient way of doing it than in dialog boxes. Dialog boxes, while open, prohibit accessing the document; to do something to two objects individually via a dialog box requires more steps than doing it through panels, which are always onscreen. The downside to panels is, of course, panel bloat.

Below, we'll go through the various ways Adobe has built into InDesign for organizing panels. I'll also offer some advice on which ones you can safely keep off your screen.

## The Panel Dock

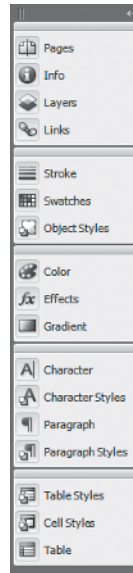
The dock is InDesign's attempt to organize panels on single-monitor systems where space is at a premium.

Dragging panels to the side of the application window no longer creates a series of slender, vertical bars as would occur in InDesign CS2 and InCopy CS2; now panels become labeled icons in the panel dock, a top-to-bottom reserved area of the application window (see Figure 1.1). In some programs, such as Photoshop and Illustrator, the icons are unlabeled, resulting in a much slimmer dock (and consequently a wider document working area).

InDesign can have icon-only docks too; they just don't appear that way in the default workspace. To slim down an InDesign dock to icon-only mode and reclaim most of the horizontal space for the working area, drag the triple bars at the top of a dock toward the screen edge (refer back to Figure 1.1). When you get to within 18 or so pixels of the edge, the dock will snap into icon-only mode.

With Creative Suite 3 and subsequent product releases, Adobe elected to remove the traditional iconography of InDesign's butterfly, Illustrator's flowers, Photoshop's feathers, and so on. Instead, it branded nearly all its applications and technologies with color-coded, two-letter signifiers strongly reminiscent of elements on the periodic table. Although your desktop, Start Menu, or OS X Dock will be brighter but less visually interesting, the workspaces of Adobe applications themselves become a cool cornucopia of grayscale icons—every panel now has its own associated icon displayed within the application dock. For easy reference, Table 1.1 pairs all the panels with their associated icons.

**FIGURE 1.1**  
The InDesign  
panel dock



**TABLE 1.1:** InDesign Panels and Their Icons

ICON	PANEL	ICON	PANEL	ICON	PANEL
	Align		Hyperlinks		Scripts
	Assignments		Index		Script Label
	Attributes		Info		State
	Bookmarks		Layers		Story
	Cell Styles		Links		Stroke
	Character Styles		Navigator		Swatches
	Character		Notes		Table
	Color		Object Styles		Table Styles
	Data Merge		Pages		Tags
	Effects		Paragraph		Text Wrap
	Flattener Preview		Paragraph Styles		Transform
	Glyphs		Pathfinder		Trap Presets
	Gradient		Separations Preview		

To use a panel in the dock, simply click on its collapsed icon or icon and title. It will expand out to the side, revealing the entire panel. Collapse it back into the panel either by clicking the double arrows pointed toward the dock or by clicking on the title tab of the panel.

Only one panel per dock may be extended at once, and by default, the last used panel will remain extended until you collapse it. If you'd prefer that panels immediately collapse back to their icon or tile states as soon as you finish with them, right-click on the dark gray dock title or an empty area of the dock itself and choose Auto-Collapse Icon Panels (you'll also find the same choice in the Preferences on the Interface pane).

Expand or contract the *entire* dock, inclusive of all the panels it contains, by clicking on the double-arrow symbol at the very top of the panel. When the panel is in icon-only or collapsed tile mode, arrows will point inward, toward the application workspace and away from the edge; when the panel is collapsed, arrows will point outward toward the edge of the screen. You can also double-click on the empty, dark title bar of the dock or Cmd+click/Ctrl+click on it to toggle between expanded or collapsed states.

## Arranging Panels

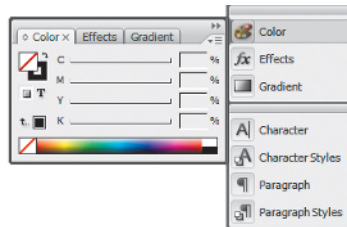
To add a panel to the default dock, drag the panel's title tab over the empty area of the dock beneath the lowest panel. When your cursor is in position, a colored horizontal line will appear across the dock. Release the mouse button to drop the panel into the dock at that point.

Remove panels from the dock by dragging the title or icon (not the gray bar above them) out from the dock into the empty application area. When you release the mouse, the panel will become free floating.

Some panels, you'll notice, are grouped—when you click the title of one to extend it, other panels are tabbed behind it (see Figure 1.2). These are grouped panels. Collapsed, their grouped arrangement is indicated by their icons or tiles contained within a light gray rectangle, with a common gray bar atop them. If you *do* drag the gray bar away from the dock, you'll detach the entire group of panels. Once detached, they will be a free-floating group of tabbed panels. Grouped panels, both on the dock and free floating, are one-at-a-time views. In other words, if the Character and Character Styles panels are grouped (as they are in the default workspace), you can view only one or the other, not both simultaneously.

**FIGURE 1.2**

Grouped panels  
extended with other  
groups collapsed



Rearrange panels in the dock by dragging their icons or tiles vertically. A horizontal line will indicate the new location of the panel should you drop it. A rule between the panel groups, in the dark area of the dock background, will reposition the panel or group to that point outside of other groups. Dropping it within the area of a group of icons or tiles, however, will add the panel to the group. Dragging the gray bar of a grouped set of panels will reposition the entire group or merge it into an existing group.

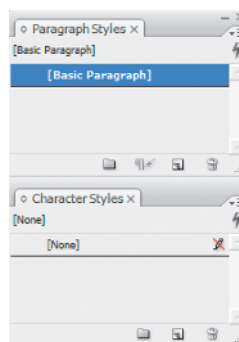
InDesign can actually contain docks on *both* sides of the application window and can have multiple columns of panels arranged side by side in the dock. Just as with adding panels to the default

right-side dock, creating and managing side-by-side docks is done by dragging. Begin by creating the first dock, and then drag another panel (or panel group) to the screen edge. Bypass the *horizontal* line indicating that the new panel will appear below the one already there, and keep going to the screen edge, whereupon a *vertical* line will appear. When you let go, the previous dock area will be pushed inward, with the new panel forming a column on the outside. You can keep going, adding columns as you like, but only within the application window. If the dock expands so far that it reaches the other side of the window, panels will begin to automatically collapse into their labeled icon tiles.

## Stacked Panels

Detached or free-floating panels have similar arrangement options. Drag the tab of one panel atop another free-floating panel or group of panels to group them into tabs. When your cursor is in position, a bold outline will appear all the way around the target panel. If you drag too close to the bottom of another panel, you'll see a horizontal line appear only there, indicating that the panels will stack rather than group (see Figure 1.3).

**FIGURE 1.3**  
Stacked panels



Stacked panels work similarly to docked panels, but with several distinct advantages. You can see and work with multiple panels at once just as you would free-floating panels, and they aren't limited to positioning at the screen edge. Like docked panels, stacked panels can be expanded or contracted into just their tabs selectively, or an entire stack can be expanded or contracted with a single click of the mouse.

At the top of a stack is a single minimize/maximize button. Clicking it contracts all panels in the stack into their title tabs or expands them all. A single close button also hides the entire stack. When you move a stack by dragging the very top, all the panels move with it.

Some panels—the Pages or Swatches panels, for instance—are resizable. Within a stack, they can be resized by hovering the cursor along their bottom edges, at the point where they join the next panel down, and dragging up or down. The cursor will become a double-headed arrow as a visual cue.

## Multi-State Panels

Many panels have expanded views with additional options, controls, or fields hidden by default. Switch between the compact and expanded views by choosing Show Options or Hide Options from the panel flyout menus. As we deal with each panel's expanded controls throughout the rest

of the book, I'll usually remind you to show the expanded view. However, since this book is written as a focused manual for using InDesign in professional print workflows rather than as a soup-to-nuts InDesign CS3 reference book, some panels won't even be mentioned in later chapters. Always check for the Show Options command on a panel's flyout menu.

Another way to discern if a given panel has multiple states is the presence of double arrows in the title tab (see Figure 1.4). Clicking on the arrows cycles through the states of any palette—condensed, expanded, and minimized. Double-clicking the title tab of the panel itself accomplishes the same state cycling as clicking the arrows.

**FIGURE 1.4**

A multi-state panel, the Gradient panel, shows a double arrow in its title tab. (Left) The condensed state. (Right) The expanded or options state.

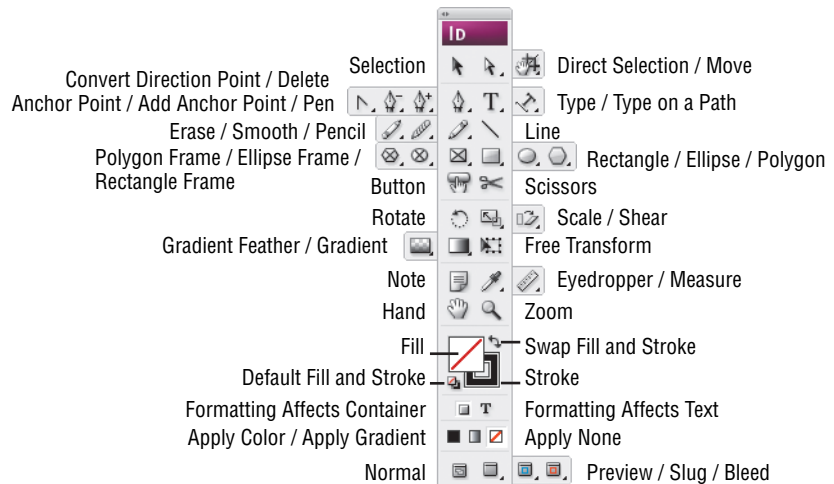


## The Tools Panel

You'll use the Tools panel more than any other. All your tools are there, as are basic fill and stroke color controls and preview modes. In Figure 1.5, I've identified each of the tool icons and different parts in an exploded view of the Tools panel.

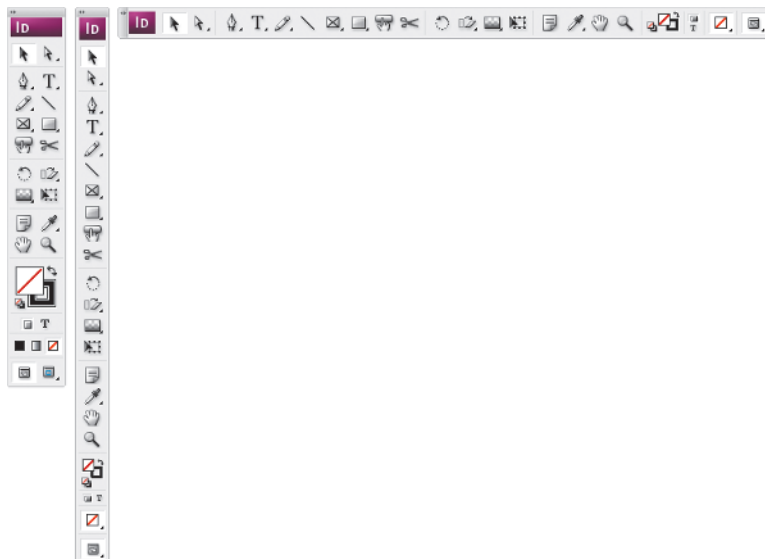
**FIGURE 1.5**

The Tools panel



Customization options for the Tools panel are limited to two choices: whether its docked or free floating and how its tools are arranged—in the traditional two-column array, in one tall long column, or as a single row (see Figure 1.6).

**FIGURE 1.6**  
The three arrange-  
ments of the Tools  
panel



The first option, docked or floating, is set in the same manner as any other panel—drag it toward or away from the screen edge. When docked, it uses the entire screen’s worth of vertical space because other panels cannot be docked beneath or above the Tools panel. That’s the con. The pro, of course, is that, when the Tools panel is docked, document windows automatically resize around it, never over- or under-lapping it as they would do in previous versions of InDesign.

The second option, whether to display the Tools panel in single-column, double-column, or single-row mode, is set in the Interface pane of InDesign’s preferences (InDesign > Preferences on the Mac and Edit > Preferences on Windows). Easier than going that route, however, is to click the double arrows at the top of the Tools panel. This will cycle it through the three states. Although the single-column and single-row modes have the advantage of consuming less screen real estate, they have a seeming drawback as well: fewer options. The three apply buttons near the bottom don’t fit in the slimmer modes, nor does the Normal view button at the very bottom. Fortunately, Adobe made up for their absence with new keyboard shortcuts. If you opt to use one of the Tools panel’s slimmer arrangements (or just like the efficiency of keyboard shortcuts), memorize the shortcuts in Table 1.2.

**TABLE 1.2: Keyboard Shortcuts for Tools Panel Features Hidden by Single-Column and Single-Row Modes**

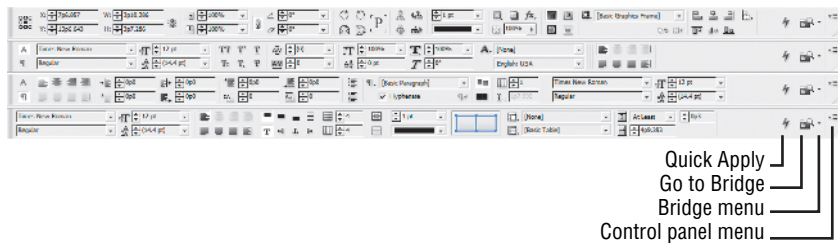
SHORTCUT	FUNCTION
, (comma)	Apply solid color to fill or stroke.
. (period)	Apply gradient to fill or stroke.
/ (slash)	Remove color from fill or stroke.
W	Toggle between normal mode and the selected preview mode.

## The Control Panel

The Control panel, a favorite among users since its introduction in InDesign CS (1) PageMaker Edition, is context sensitive to the tool and task at hand, offering a compact quick access point for the most common features and options. While you're editing text, for instance, the Control panel goes into Character or Paragraph mode, two transposable sets of fields and controls that offer, among many other things, the ability to change the font family, style, and size as well as paragraph alignments, spacing, and indents. When you're working with tables, though, the Control panel transforms to offer table-specific controls such as the number of rows and columns, cell alignments, and insets. In all, there are four modes dependent upon what you're actually doing in the document—working with objects, characters, paragraphs, or tables. Figure 1.7 shows all four modes.

**FIGURE 1.7**

The four modes of the Control panel: (top to bottom) Object, Character, Paragraph, and Table, with a few constants pointed out

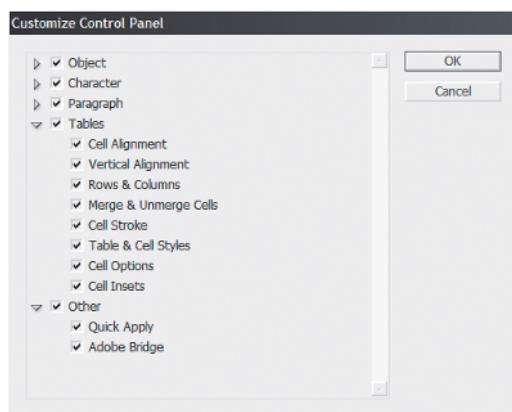


The Control panel has been upgraded in InDesign CS3. It now contains more commands—including some new ones like Apply Effect, which applies Photoshop-like object effects to selected objects (see Chapter 6, “Objects”) and buttons for flip and rotate—and it’s customizable.

The very last object on the Control panel’s right end, a button that looks like three horizontal lines, is the Control panel’s flyout menu. Like the face of the Control panel, the commands on the flyout menu are context variable. At the bottom of the list, the Customize command is constant and opens the Customize Control Panel dialog box (see Figure 1.8). Here, by unchecking the show box in the expanding lists, you can selectively disable groups of controls or an entire mode. Maybe you’d rather not have Adobe Bridge shoved down your...er...um...maybe you’d rather Bridge not be so obvious in so many places (there are commands for it in the menus as well as the Go to Bridge button and accompanying drop-down menu on the face of the Control panel). To dump the Go to Bridge button, expand the Other section of the Customize Control Panel dialog and uncheck Adobe Bridge. The same goes for anything else you’d rather not see on the Control panel.

Also at the bottom of the Control panel flyout menu are commands to dock the panel to the top of the application window, its default location, dock it to the bottom, or float it free à la PageMaker’s Control palette and QuarkXPress’s Measurements palette. Once free floating, the Control panel can be positioned anywhere you like onscreen, but always horizontal. In addition to using the menu commands, dragging the gray bar on the left edge of the panel moves the panel around as well attaching it to, or detaching it from, the top or bottom edge of the application. When you drag a floating Control panel close enough to either the top or bottom, a thick horizontal line, similar to the one you see when docking other panels, will appear above or below the panel; release the mouse button and the panel will snap into its docked position.

**FIGURE 1.8**  
Customizing the  
Control panel



If you're running a monitor with a horizontal resolution greater than 1024 pixels, you'll be able to take advantage of a new dynamic in the Control panel. All the primary controls of each mode are contained within the first 1024 pixels. With previous versions, that was it; if your screen was wider, a docked Control palette left any extra pixels blank, wasted space. With the CS3 version, however, Adobe uses much of that space. After the primary controls have been rendered, several modes of the Control panel will present additional controls for your convenience. In Character mode, for example, more paragraph-centric fields and options will fill the extra space after all character-centric fields. In Paragraph mode, more of the character-centric controls slip in there. The idea, of course, is that if you have the space to use, InDesign will use it to save you a few times toggling between Character and Paragraph modes.

### Panels You Don't Need

So upgraded is the Control panel, in fact, that it negates the need to use some other panels almost entirely. Conversely, you can elect to hide the Control panel, saving yourself some vertical screen real estate. The main advantage to using the Control panel is its context-sensitive nature; depending on the task at hand, it contains the majority of controls, options, fields, and buttons from the Transform, Align, Character, Paragraph, and Table panels, as well as some from the Stroke, Text Wrap, Effects, Character Styles, Paragraph Styles, Object Styles, and other panels. All these controls share the same space onscreen, which is far less real estate than the panels consume individually—even with panel docking and other space-saving options.

Although the options on the Control panel are not comprehensive replicas of all the dedicated panels mentioned in the previous paragraph, you may only need more on rare occasions. Consider your unique workflow and examine what is and isn't available on the Control panel to be sure, but you can probably safely hide the following stand-alone panels and reclaim the space they would occupy for other panels not duplicated on the Control panel:

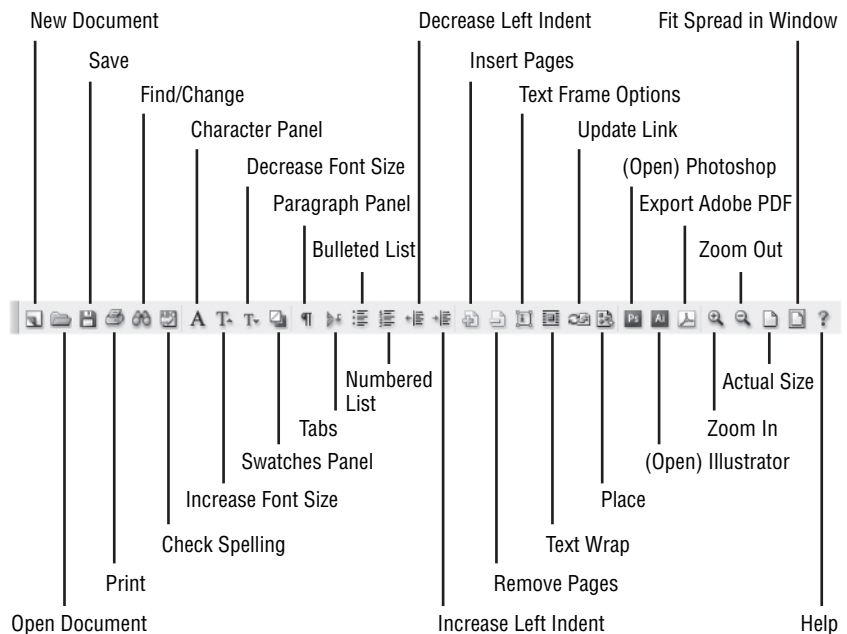
- ◆ Character
- ◆ Paragraph
- ◆ Table
- ◆ Transform
- ◆ Align

On the other hand, if you prefer using the individual panels (personally, I prefer using the Character, Paragraph, and Table panels rather than the Control panel most of the time), drop the Control panel and reclaim *that* space. With such a panel-laden application, where docking, grouping, and stacking panels and multiple monitors merely mitigate screen overcrowding and a claustrophobic document workspace rather than solve it, repossess any pixels you can.

## Command Bar

Activated from Window > Object & Layout > Command Bar, this toolbar includes several common functions in an area even more compact than the Control panel or Tools panel. Like them, the Command Bar can be left free floating or docked to the top or bottom edge of the application window. Figure 1.9 identifies all the buttons of the Command Bar.

**FIGURE 1.9**  
The Command Bar



## Keyboard Shortcuts

Somebody far back in time invented computer keyboard shortcuts, the ability to press a few keys simultaneously to produce the same effect as, and in lieu of, reaching for the mouse and navigating a menu. I don't know who came up with the idea of keyboard shortcuts—I think it was Cro-Magnon man, but it might have been Neandertal. Whomever it was should have a statue erected in his honor. Maybe there already is; I haven't visited the Smithsonian in a few years.

Keyboard shortcuts save tremendous time and effort and are, in my opinion, the greatest productivity enhancing invention since instant coffee (circa 35,000 BCE). InDesign is loaded with keyboard shortcuts to speed your work. And, at this point in the narrative, many software book authors would launch into several pages of keyboard shortcuts or direct you to an index of the same. Me? Well, I've got precious few pages in which to cram all the advanced InDesign info I can.

I'm not going to waste 3 to 10 or so of those with something I can give you in a different medium (see the sidebar "InDesign CS3 Keyboard Shortcuts"). More importantly, I can give you something even better than a list of keyboard shortcuts: I can show you how to set your own keyboard shortcuts for just about everything.

### INDESIGN CS3 KEYBOARD SHORTCUTS

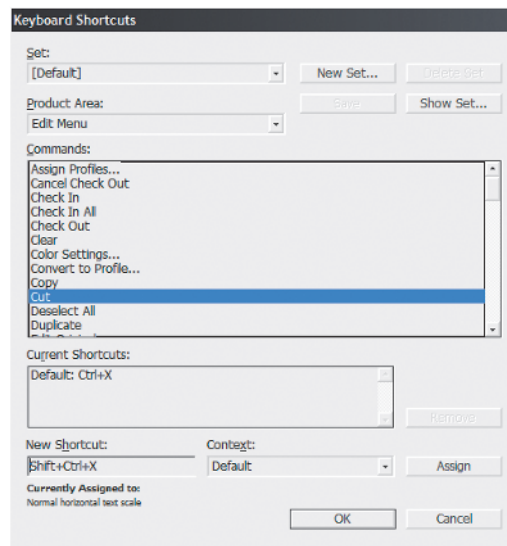
Even with the ability to customize every keyboard shortcut in InDesign, sometimes it's nice to have a list in front of you. So, I made one.

Visit <http://QuarkVSInDesign.com/resources/downloads/> to download a free and printable PDF containing every keyboard shortcut for InDesign CS3 and InCopy CS3 on both Windows and Mac.

If you'd prefer something preprinted, my friends David Blatner and Anne-Marie Concepcion sell a poster with all the InDesign CS3 keyboard shortcuts—Mac on one side, Windows on the other. You'll find that here: <http://indesignsecrets.com/indesign-poster-details/>.

If you choose Edit > Keyboard Shortcuts (on Windows) or InDesign > Keyboard Shortcuts (on Mac), you can assign a keyboard shortcut to any command in InDesign, change the shortcuts already assigned, and create portable sets of shortcuts (more on portability later). In the Keyboard Shortcuts dialog (see Figure 1.10) you'll see, by default, the commands and shortcuts of the Edit menu.

**FIGURE 1.10**  
Editing keyboard  
shortcuts



Click on Cut in the Commands list. Its shortcut—Cmd+X/Ctrl+X—will appear in the Current Shortcuts field beneath the list. Don't like that shortcut? Click on Default: Cmd+X or Default: Ctrl+X to highlight it, and then click the Remove button. InDesign will promptly notify you that you cannot modify the Default set of keyboard shortcuts and ask whether to create a new set for

your customizations. InDesign can contain multiple keyboard shortcut sets. In fact, if you look toward the very top of the dialog, it already had three—Default, Shortcuts for PageMaker 7.0, and Shortcuts for QuarkXPress 4.0. If you’re migrating to InDesign from PageMaker or QuarkXPress, using one of those sets can ease your transition. In the QuarkXPress set, for instance, object arrange commands such as Bring Forward, Bring to Front, Send Backward, and Send to Back use XPress’s familiar F5 commands instead of InDesign’s commands, which use the left and right brackets ([ ]). Of course, InDesign isn’t PageMaker nor QuarkXPress, so not every command or keyboard shortcut from one has a place in the other; the shortcut sets are not total conversions, but helping hands.

To create your own set, click the New Set button and name the set, or begin a change and answer Yes when prompted. Go ahead and create a new set now, just to practice while you go through the rest of this section. While working in your set, remember to save it from time to time with the button at the top. If, after working through this chapter, you elect to eject the shortcut set, simply choose it in the Set drop-down and click the Delete Set button.

Returning to modifying the Edit > Cut command, let’s stay that, instead of removing the default shortcut, you’d like to add a second shortcut. You’d like both Cmd+X/Ctrl+X and Cmd+Shift+X/Ctrl+ Shift+X to effect a cut. In that case, to add a shortcut, position your cursor within the New Shortcut field at the bottom of the dialog and press the new shortcut. (Note to Windows users: You cannot use the Windows key as a modifier within the application.) Beneath the field you should see a warning that Cmd+Shift+X/Ctrl+ Shift+X is already assigned to the Normal Horizontal Text Scale command. If you click the Assign button, you’ll strip Normal Horizontal Text Scale from the shortcut and assign it to Cut.

To the right of the New Shortcut field is Context. Every keyboard shortcut can be targeted to certain types of tasks. You could, for example, bind Cmd+Shift+X/Ctrl+ Shift+X to Edit > Cut only when working with tables. While working with text, with XML selections, within alert and dialog boxes, and in all other circumstances, it will not invoke the Cut command. In fact, if you set the Context field to Table now, you’ll see that the Currently Assigned To notice no longer says Normal Horizontal Text Scale. That’s because the shortcut is bound to that command only in the context of working with text. The horizontal scale of text is irrelevant to XML code, dialogs, and the structure of tables, and that command and shortcut combination has been assigned to function only where it *is* relevant—when working directly with text. If you left Context set to Table and assigned Cmd+Shift+X/Ctrl+ Shift+X to the Cut command, *that* would apply only when working with tables. The same shortcut would still invoke Normal Horizontal Text Scale when working with text. In other words, the same keyboard shortcut can be *used five times over* for different commands in different contexts.

There are only so many keys on the QWERTY keyboard, only so many modifiers and combinations of keys, so customizing keyboard shortcuts in InDesign often entails sacrificing keyboard access to one command for another. By the same token, just as you can add multiple shortcuts to Cut, other commands already have multiple shortcuts. Do they need two (or three)? Probably not, which means their extras are fair game for commands that don’t have any. Other commands have shortcuts you’ll never use; put those key combinations to better use. If you use the Gradient Feather effect often, give it a keyboard shortcut (it doesn’t have one by default, although the Drop Shadow command does—Cmd+Shift+M/Ctrl+Shift+M).

The Product Area drop-down mirrors the structure of menus but includes a lot more, even commands not found on the menu bar. Object Editing, for instance, includes all sorts of align, distribution, scale, and nudge commands that simply don’t have counterparts on any menu and would normally require mouse work. Explore around the dialog, changing and testing shortcuts, until you have all your most-used commands shortcutted and InDesign works your way.

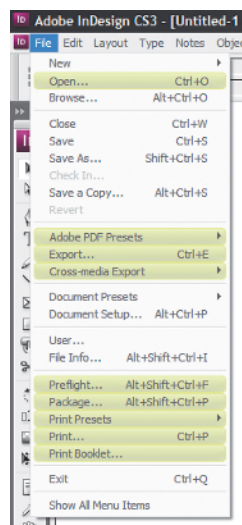
The folks at Adobe did a great job in setting keyboard shortcuts on the commands most used by the average InDesign user, but they had to leave it up to you to tailor the program to *your*

unique workflow. Keyboard shortcuts, various panel arrangements and customizations, even customizable menus are available to tailor the program to you. Use them.

## Menus

Yes, you read me right: In InDesign CS3 you can customize menus. Photoshop CS2 (and its now-retired protégé ImageReady CS2) introduced the idea of customizable menus. Odd as it may sound, it's a pretty cool idea. Do me a favor: Select Window > Workspace > Printing and Proofing. You'll likely be prompted; answer in the affirmative. Now, return to the Window menu. Notice anything? Check out the File menu. You should see quite a few commands and submenus highlighted in a pleasing green (see Figure 1.11). Try Window > Workspace > New and Improved in CS3. Just about every menu will then show something highlighted in blue.

**FIGURE 1.11**  
Menu highlighting  
in use to show off  
printing and proof-  
ing commands

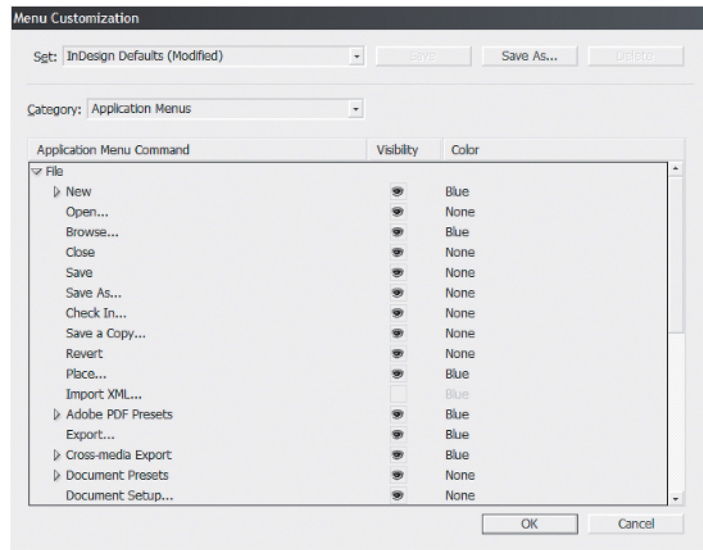


Now, go to the blue-highlighted Menu command at the bottom of the Edit menu to open Menu Customization (see Figure 1.12). Similar to customizing keyboard shortcuts, you have sets to create and choose from and two categories of menus—Application Menus, those that appear within the menu bar at the top of the InDesign window, and Context & Panel Menus, which are the flyout menus on panels as well as those menus that appear when you right-click (Control-click for you single-button Mac mouse users) on something. Every menu in InDesign can be customized. Pick one. Click the arrow to the left to expand the menu, showing commands and submenus in the order in which they appear on the menu itself.

If there's a command that you never use, one you'd like out of your way, click its eyeball icon in the Visibility column. The menu command or submenu will disappear from the application as if it didn't exist. To highlight a menu like those that turned blue in the New and Improved in CS3 workspace, change the color in the third column. Sorry, no custom colors, just the basic rainbow red, orange, yellow, green, blue, violet, and gray (for rain clouds, I assume).

*Why would I want to remove some commands?* you might ask. Well, the vast majority of InDesign users never use everything in the application. Do you do any XML work? If not, you can hide the XML-centric commands and unclutter the interface a little.

**FIGURE 1.12**  
Customizing menus



Next, I'd expect you to ask, *Why would I want to color-code my menu commands?* As you saw Adobe do with its sets, color-coding menus is a great way to learn new features and commands. It can also help in memory: *Where do I set the options for an inline graphic so that it has vertical spacing? Oh, duh! Here it is: Anchored Objects on the Objects menu. I colored it red last time I used it six months ago so I'd remember where to find it again.*

For you production managers, editors, and other team leaders, customizing menus presents a new level of production control through customized workstation installs without messing with installer scripts or disabling plug-ins. Check out the sidebar “Customizing InDesign to Easily Create Workflow-Focused Workstations” to see how I helped the editor of one small newspaper keep her staff focused and her layouts clean and press-ready.



## Real World Scenario

### CUSTOMIZING INDESIGN TO EASILY CREATE WORKFLOW-FOCUSED WORKSTATIONS

Very recently, I was asked to improve the workflow of a high school newspaper. The request came from Pam, the editor in chief and a teacher at the school. Pam was exasperated with her paper's workflow. She had good reporters and editors, but none of them had had graphic design training despite the fact that they laid out their own copy and photos and worked up advertisements for the paper's local sponsors. Her teenage staff probably knew more about technology than either Pam or I, but they're prone to—let's say—*experimenting* with imagery and effects. They had a tendency to try to reproduce in their articles and ads anything that caught their eye in any medium—other newspapers, magazines, printed advertisements, broadcast media, the Web, and, most often, MySpace.com. All of this despite the fact that the paper was one color (with thrice-annual special editions going to two or three colors). Before putting the paper to bed every week, Pam lost a night of sleep fixing the staff's experiments and converting too-similar color pairings like RGB deep purple and dark red to colors that would contrast in 85 lpi black on newsprint.

When the school board delivered InDesign CS3 with its object effects, attribute-level transparency, and other features, Pam foresaw her one night of cleanup and fix stretching into a night and a day. The students' designs, she said, will only get more wild. Because Pam had classes to teach, and because students' class schedules varied, staffers often worked in the paper's office without supervision. The teenagers, who by their own admission know far more than we experienced old fogies, simply couldn't resist engaging in...experimental...design. New features of CS3 would improve the productivity and creativity of the staff, but other features would make more work for Pam. This was the problem. The solution was to customize the menus.

Armed with the character of the publication—B&W, 85 LPI, newspaper—the list-style presentation of commands in the Menu Customization dialog made it easy to compile a list of what commands and panels staffers needed and what they didn't. Then, it was just a matter of turning off what they didn't need. Because the publication is printed only in black ink, we disabled Window > Color and removed the corresponding shortcut, preventing the Color panel from being accessed. The Swatches panel, preloaded with tint swatches of process black and all other colors removed, we left available to the students, but we disabled the Swatches panel menu commands for New Color Swatch, New Mixed Ink Swatch, and any other command that would have enabled the creation or loading of colors other than those added to the default palette by Pam. (We couldn't do anything about the New Swatch button at the bottom of the panel, though, so we disabled the Color Picker .apl and other plug-ins.) For those thrice annual two- or three-color special issues, Pam will create new InDesign INDT templates containing the same black tint swatches and matching tint swatches for the chosen spot color(s). We turned off access to object effects, transparency, HTML and XML export, and quite a few other commands and panels that the students didn't need in order to write and lay out their newspaper—disabling both in the main application menu and in panel and context-sensitive menus. At the same time, we colored menu commands that were new to CS3 or had moved since CS2 to help the students learn the new version.

To prevent the technology savvy teenagers from undoing everything, we assigned custom (and difficult-to-guess) keyboard shortcuts to open the keyboard shortcut and menu customization dialogs and to revert to the default workspace (thus restoring access to the Window > Workspace menu and everything else so that Pam could later change the customizations if needed); changed the default shortcut for InDesign's Preferences, and then hid them all from appearing on the Edit and InDesign (Mac) menus.

As a last step, after making all the menu and keyboard shortcut changes and showing and arranging all the required panels, we saved all the presets individually and created a new workspace that unified these settings. The result was a lean InDesign installation completely customized to the needs of the school newspaper and bereft of anything that didn't have a place in the workflow. The final step was to copy the shortcut set, menu set, and workspace from the build machine to the staff's workstations and load the preset workspace that mirrored the workstations to the build machine.

Pam tells her students it's InDesign Elements CS3, a new product built specifically for black-and-white newsletter publishing that Adobe is test-marketing among several schools and newspapers.

Of course, these changes couldn't prevent a student from drawing something completely inappropriate in Illustrator or Photoshop and then placing it in InDesign. Both of those applications have similar customization features, and we limited some of their functionality on the workstations, but by necessity, it couldn't be as thorough a streamlining as within InDesign. Still, last I heard, Pam's per-issue cleanup had dropped from a full night of work to less than two hours because of the limited InDesign installations.

## Plug-In Customization

Another level of application customization available to you is via the removal of plug-ins. (Individual users, feel free to skip this section.)

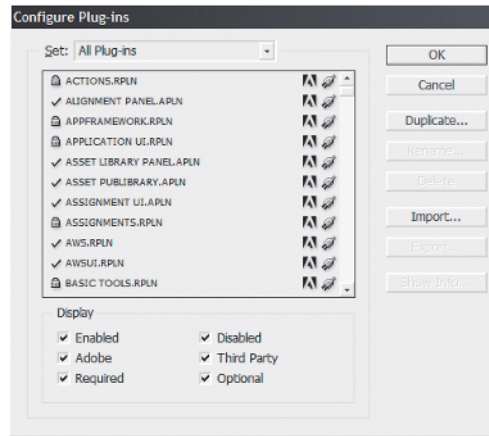
InDesign, you see, is not so much an application in the traditional sense of computer programming. It isn't hundreds of thousands or millions of lines of code compiled into a single executable like most other applications. `InDesign.exe` (Windows) and `InDesign.app` (Mac) is actually a plug-in wrapper. All of InDesign's functionality is added through plug-ins that are no different than a third-party plug-in you may buy to give InDesign functionality Adobe didn't. Don't believe me? Go look in your InDesign installation folder (`Applications/Adobe/Adobe InDesign CS3` on the Mac, `Program Files\Adobe\Adobe InDesign CS3` on Windows). The InDesign application itself is but a few megabytes. Look inside the `Plug-Ins` folder on the Mac to find numerous `.InDesignPlugin` files arranged in subfolders. On Windows, you'll see the same subfolders beneath the `Plug-Ins` folder. On either platform, you'll see mostly plain-English names for all your favorite InDesign panels and features. The Eyedropper tool, for instance, is added to InDesign Windows by the inclusion of the `Eyedropper Tool.apln` plug-in, for instance; the Print dialog is `PrintUI.InDesignPlugin` on the Mac. The InDesign executable mostly acts as activator to run those plug-ins and glue to allow them to work together. There's also an extra layer of organization on Windows that isn't on the Mac. Windows users will note the `Program Files\Adobe\Adobe InDesign CS3\Required` folder, which contains `RPLN` plug-in files. The `.rpln` extension stands for *Required PLug-iN*. As the name implies, everything in the `Required` folder is required for InDesign to fulfill its base purpose. In the `Plug-Ins` folder are all the optional plug-ins, the ones InDesign *can* function without. Most you wouldn't want it to run without, though. For example, you could pull out the `Page Setup Dialog.apln`, but then you wouldn't be able to alter page sizes. On the Mac, plug-ins aren't so easily differentiated as required, and nonrequired plug-ins all share the `.InDesignPlugin` extension.

InDesign can function, to one degree or another, absent any of the nonrequired plug-ins. Therefore, if some or all of the people in your workgroup have no need of something like, say, hyperlinks and the Hyperlinks panel or type on a path, you can save (a little) system overhead and tidy up the InDesign interface a bit by disabling the plug-ins that add those functions.

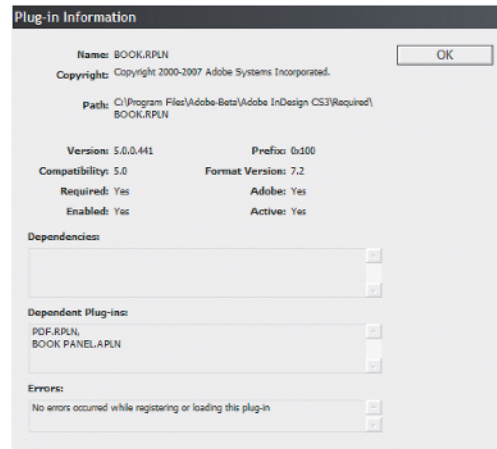
If you go to `Help > Configure Plug-Ins` (Windows) or `InDesign > Configure Plug-Ins` (Mac), you'll see all the plug-ins installed in your copy of InDesign—required, optional, and any third-party plug-ins you may have (see Figure 1.13). There are, by default, three sets of plug-ins defined: `All`, which shows everything, `Adobe Plug-Ins`, both required and not, and `Required Plug-Ins`. In any set, required plug-ins appear with a padlock icon to the left and are always active. Active nonrequired plug-ins have a check mark in the first column. Where possible—and certainly with Adobe-created plug-ins—a logo of the plug-in maker appears in the third column, and a cute little plug icon shows in the fourth. At the bottom of the dialog, the `Display` section check boxes enable further refinement of the view.

Anything without a padlock can be disabled by clicking the check mark icon. Like customizing keyboard shortcuts, the first such change you make will prompt you to create a new plug-in set, which is just a list of which plug-ins are active and which not. Any plug-ins neither you nor InDesign need to do your job, disable them; you'll have a leaner InDesign with less demand on your system RAM. If you're not entirely sure what a plug-in does, highlight it and click the `Show Info` button. Although the resulting `Plug-In Information` dialog isn't guaranteed to be illuminating, I might offer some clues (see Figure 1.14). At the very least, the `Dependencies` area will note any other plug-ins required for this one to run and, beneath that, which plug-ins can't run if you disable this one.

**FIGURE 1.13**  
Configuring  
InDesign plug-ins



**FIGURE 1.14**  
Information on the  
Book .RPLN plug-in



When in doubt about what a plug-in does and whether you need it, try disabling it and look for the absence of what you think it does. Fortunately, you can't accidentally disable the Configure Plug-Ins dialog itself as `Plugin Manager.apln/Plugin Manager.InDesignPlugin` is required (despite the lack of an `.rpln` file extension), so you can always simply reactivate a plug-in you want.

*Why would I want to disable some plug-ins?* For many of the same reasons you'd want to disable some menus—a cleaner display, the aforementioned smaller RAM footprint, and to limit workstation installs to only what is required of the user's workflow. If your team works in a strictly print workflow, for instance, and never exports to HTML or to PDFs for distribution online, you can remove commands, panels, and everything else to do with hyperlinks, form fields, sound and video, HTML and SVG export, and so on. I can tell you from personal experience that using Configure Plug-Ins to disable things like the Tools panel (`Tool Box.apln`) on someone else's computer is also an amusing practical joke. Just be kind enough to let the victim in on the joke before too long (or leave this book nearby opened to this page and I'll take the blame).

## Workspaces

Now that you've got InDesign all customized to your personal work habits, with this panel stacked over here, another dozen panels collapsed to icons in a dock, three more stacked, and several panels hidden, menus color-coded and customized, and keyboard shortcuts totally customized, it's time to scare you: Everything you just did will evaporate the first time InDesign's preferences get corrupted. They get corrupted often—no more so than other applications, but that's too often.

All your customizations are saved into the application preferences, a flimsy little ASCII text file with all the resiliency and tensile strength of wet newsprint. Sneezing too hard in the general direction of your computer could tear and corrupt the preferences. Then where would you be? That's right, trying to remember all the original keyboard shortcuts while stumbling all but blind through the original configuration of panels. Of course, there's a solution to prevent the loss of your customizations. And, I'll explain that solution in detail in the sequel to this book, *Mastering InDesign CS3 for Print Design and Production Reloaded*, due out from Sybex next year. Don't let your preferences get corrupted before then.

Just kidding. I was doing an impression of a typical local news anchor—*tune into our six o'clock broadcast to find out what's killing area children and could be killing your child right now!* (Yup, tune in at least three hours after your child has been presumably slain to learn that children are being given two desserts in the school cafeteria on Fridays.)

InDesign has, for several versions now, had the ability to save panel (previously palette, lest we forget the tragedies of yesterday) arrangements as *workspaces*. With InDesign CS2, workspaces saved custom keyboard shortcuts along with palette arrangements. In CS3, they now save menu customizations, keyboard shortcuts, *and* panel arrangements. It's the last part that's the most important because, while you can save and restore sets of keyboard shortcuts and menus, workspaces are the only way to record panel arrangements.

When we looked at menu color-coding a few pages ago, the New and Improved in CS3 and Printing and Proofing options you chose were workspaces. You may have noticed that loading them also rearranged your panels. If you missed that, load up Printing and Proofing again from Window > Workspaces. Note the dock on the right wherein several panels have been hidden and replaced by others not shown after first installing InDesign. The Default Workspace saved workspace will return everything—shortcuts, menus, panels—to out-of-the-box InDesign.

Any time you customize InDesign, save your workspace by choosing Window > Workspaces > Save Workspace. Supply a name and your workspace will be added to the Workspaces menu ready for instant restoration in the event of a preferences corruption and subsequent reset or if you change things around to fit a particular project.

That brings me to another key point: You can have many, many workspaces. Sometimes you need these five panels showing, some projects require these six others, and yet other types of projects require a dozen or more, all with options showing. Make workspaces for each of your typical types of projects. Strictly print projects, for instance, aren't likely to need the Hyperlinks panel, whereas creating a publication that will only be distributed on the client's website as a PDF *does* need Hyperlinks, and probably doesn't need the Separations Preview and Trap Presets panels. By employing multiple, project-specific workspaces, you can further reduce panel clutter by limiting the application to only what the one type of project needs, without the chore of having to manually open, close, and arrange panels every time you switch over to a different project.

## InDesign in Your Pocket

Or, *InDesign on a Stick*—a USB stick/thumbdrive/flash drive. Although you *can* fit InDesign and all its component plug-ins on most portable USB flash drives, it won't run from there. (Well, I'm sure somebody could get it to run, but I think that would violate the EULA.) What I mean by the title of this section is taking *your* InDesign in your pocket, your unique configuration and work habits, and sitting down at any workstation and, in 30 seconds or less, making any copy of InDesign CS3 work exactly like InDesign on your main computer—complete with panel arrangements, keyboard shortcuts, menus, and even your own autocorrect settings and Find/Change queries.

It's exceedingly simple, really. First, make sure you've created a new keyboard shortcut set, a new set of menus, and a new workspace. Create and save them in their respective manners. Nothing here is permanent, so please don't feel pressured to create the perfect workspace or customize everything right now. Just do something simple for each, save the set, and close InDesign.

Now, open a Finder or Explorer window and navigate to the InDesign folder:

Mac: [your user name]/Library/Preferences/Adobe/InDesign/Version 5.0/

Windows: Documents and Settings\[your user name]\Application Data\Adobe\InDesign\Version 5.0\

Within those folders, you should see a subfolder for Workspaces. Open that, and you'll find an XML file of the workspace you just created. Go back up to the Menu Sets folder to find your recently created menu set. At the same level as both of those folders, you'll find others, called InDesign Shortcut Sets, Autocorrect, Find-Change Queries, and Glyph Sets. All of these folders store personal, per-user settings that are machine and even platform independent. You can pick up these files by copying the entire Version 5.0 folder, carry them to any other installation of InDesign CS3 on the same platform (Windows or Mac), copy them to the same locations on the new machine, and have access to them at that workstation just as you would your own. When you launch InDesign, your copied workspace will be on the Window > Workspaces menu, your keyboard and menu sets in the Keyboard Shortcuts and Customize Menu dialogs' Sets drop-downs, and your Autocorrect, Find/Change, and Glyphs sets where they belong (I cover each later in this book). In fact, if you're handy with scripting, you could probably write an AppleScript or VBScript or BAT file that, upon execution on a target workstation, copies the Version 5.0 folder from the USB drive to the hard drive.

You can even store your portable InDesign settings on your iPod, which, if you didn't realize it, can hold any type of data, not just music and videos. *That* would sell a few copies of this book! I can see the cover line now: *Run InDesign from Your iPod!*

## Customizing Application Defaults

*Is there a way to change the default font/swatches/hyphenation options/whatever?* Collectively, it's probably the most common question I'm asked. Answer: Yes. If you can change the font family and style in the Character panel, you can change the default font. Likewise with creating new default swatches and removing the swatches with which InDesign ships. In fact, if you can do almost anything, you can make it the new default. Just do it with all documents closed.

Open InDesign without a document and look at the panels. If an option is grayed out, you can't change its default. If it isn't grayed out, well...there you are. Do you want hyphenation turned off by default instead of on? Uncheck the Hyphenate button on the Paragraph panel (show options if

you don't see it). To remove swatches you rarely use, open the Swatches panel and delete them. Add new swatches you use regularly—like corporate colors—by adding them to the panel with all documents closed. Every new document from that point forward will use only the swatches you see there, or will leave hyphenate unchecked, or whatever change you want to make.

To change the default font, open the Character panel and change the font. Done. Well, not entirely. You see, InDesign has a default paragraph style. When you change type options on the Character or Paragraph panels, you are indeed setting new defaults. However, you aren't changing the default styles, which can lead to problems later on if you reapply the default styles to text. If you're sure of your new font (or other type styling defaults), make the changes in the Character and/or Paragraph panels, and then open the Paragraph Styles panel. Highlight the Basic Paragraph style, choose Style Options from the panel flyout menu, and then repeat your changes there, making sure to save the style. Now your changes will survive a reapplication of the style.

Experiment with different controls and options. You can set new defaults for a great many things when no documents are opened.

### SHARING CUSTOMIZATIONS

Many of the customizations we've covered in this chapter can be easily shared with others in your workgroup. Things like workspaces, keyboard shortcuts, autocorrect pairs, find/change queries, and more can be shared and standardized across your team. In Chapter 12, "Collaboration," you'll learn how; you'll also learn about the more powerful means of document and page collaboration available with InDesign CS3.

## The Bottom Line

**Organize Panels and Use the New Panel Docks** New docks and other options make organizing panels in the workspace easier than ever before.

**Master It** Beginning with the default workspace, open all the panels you expect to use in most projects and close those you won't. Now, using grouping, stacking, docking, or just free floating panels, arrange the panels to fit your work style and leave you as much room to work on documents as possible.

**Customize Keyboard Shortcuts** Adobe couldn't assign a keyboard shortcut to everything—there just aren't enough keys—so it did its best. Many of your favorite commands may not have shortcuts or may have shortcuts you dislike. You can add or change keyboard shortcuts for any command in InDesign.

**Master It** Just for fun, create keyboard shortcuts for each of the object effects—Basic Feather, Bevel and Emboss, and so on.

**Remove Parts of InDesign to Create Lean, Workflow-Specific Installations** By customizing menus and disabling plug-ins, you can now easily remove features and functions of InDesign not required by your workflow. Doing so streamlines the interface, reduces errors, and ultimately increases productivity among workflows that do not require the entirety of InDesign.

**Master It** To test your hand at removing features from InDesign, find all the features that are new or improved in CS3 and hide their menu commands. Then, color green the first 10 still enabled menu commands about which you'd like to learn more. Finally, disable the plug-ins that show panels you or your team aren't likely to need.

**Change the Default Font, Colors, and More** Out of the box, InDesign uses Times New Roman 12/14.4 pt as the default text style and includes swatches for process magenta, cyan, and yellow and RGB red, green, and blue. These defaults are fine if your average document uses 12/14.4 Times New Roman and only solid process or RGB colors. But, if the average document you create requires another typeface, size, or leading or other colors, or virtually any other option different from the defaults, change the defaults and save yourself some time.

**Master It** Think about the documents you create most often. What is the type style—font family, font style, size, leading, and other formatting attributes—you use more than any other? Make those your new defaults. Do the same with your swatches, eliminating any colors you rarely use while adding those you use frequently.

### **Carry Your Personalized InDesign Work Environment in Your Pocket or on Your iPod**

From freelancers brought into agency offices to assist with crunch time to students working in school labs, from round-the-clock production teams where different shifts use the same equipment to those dedicated enough to bring work home, seldom do creatives work solely on a single machine anymore. Creative and production personnel who switch computers waste a significant portion of their time customizing the InDesign environment of each computer on which they work even for a few minutes. To save time, nearly everything customizable about the InDesign CS3 working environment is portable. Customize one copy of InDesign, and carry your unique environment with you, making you instantly productive at any workstation.

**Master It** After arranging your panels and customizing your keyboard shortcuts and menus, it's time to take your InDesign workspace with you. If you have a USB flash drive, an iPod, a PDA, or even just a floppy disk handy, copy the files containing your customized environment to the storage device. Now, if a second computer is available with InDesign CS3 installed, install those files to that computer and set up InDesign CS3 your way.

