Moving to InDesign

Ten things you should know about making the switch to InDesign CS

By Bob Atkinson

1 Virtually anything you can put on a page with QuarkXPress (QXP), PageMaker (PM), Illustrator, FreeHand or any other page layout program you can do with InDesign CS (IDCS). That said, you'll probably have to learn new tools and shortcuts to do these things quickly and efficiently. There is often more than one way to do something in InDesign, and you'll need to find the approach that works best for you.

2 If you work with recent versions of Illustrator or the final versions of PM (v. 6.5 or 7) you'll find a lot of familiarities in InDesign. If you've worked only with QXP you'll find the differences a lot wider. Adobe has used tool types and conventions from Illustrator and kept a few ideas from PM. The program ships with its own keyboard shortcuts and a set that's similar to the one in QXP that you can choose in Preferences. One for PM users is available separately. If neither of these is for you, you can create your own complete keyboard shortcut set.

3 If your experience is primarily with QXP, there are a whole range of things you can do in InDesign that were impossible in QXP without commercial add-on Xtension products. Things like smooth drop shadows, transparency effects and feathered edges. Many of these effects need to be 'tamed' before you send

them for final film or plate output, however, especially if you use older RIP software. To do this, you'll want to learn how to use InDesign's flattening options.

4 Take advantage of the tight integration between IDCS and other Adobe products. In addition to importing all the usual graphic file formats like TIFF, EPS, JPG, and others, IDCS can also import native PhotoShop and Illustrator files and keep all effects intact, speeding up your workflow and saving disk space. When the InDesign file is saved or exported to a normally flat file format like EPS or PDF any special effects in these imported files are flattened as well.

5 You can now work in English, French and many other languages. Unlike QXP, which limits you to English-only for spell-checking, proper hyphenation, justification and other functions, IDCS allows you to choose a language format for every story. To get that in QXP, you'll need to shell out $2,200 for a copy of QXP Passport.

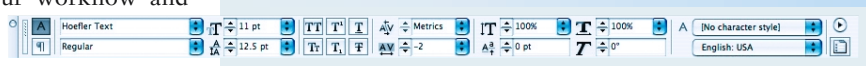
6 Open and convert your old QXP and PM document and template files—with limits. PageMaker 6.5 and 7 files will open in IDCS with well-preserved text and graphic page objects, master page objects, page positioning, graphic and internal text box links, groups, tables, applied colour profiles, type specs, styles, colours and almost everything else. One important exception applies to any graphics embedded in the PM file using the Paste function—these will not be converted.

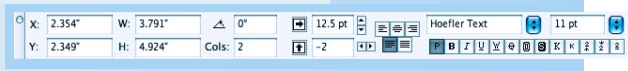
Opening and converting QXP files is a bit more of a challenge. First, and probably most irritating, IDCS can only open QXP files from versions 3.3 or 4.1x, both of which have been out of production and widespread use for some time. If you have QXP 5, you must open the files in it and save down to v4, and if you work with QXP 6.x you have to open it there and save it down to a v5 file, THEN open it in QXP5 and save it further down as a QXP 4 file, hoping that you actually still have both versions of the program on your computer and that your file does not use any of the v5 or v6-only capabilities. Adobe certainly took a lot of trouble to get the PM/QXP-opening feature to work as well as it does, so it's strange that it has not added the ability to open more recent QXP files. And, as of this writing, I have not seen an add-on InDesign plug-in product that offers support for v5 or v6 QXP files.

Adobe InDesign | **QuarkXPress**

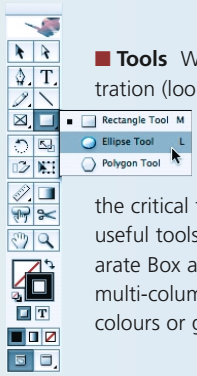
Which design package comes out on top with handling common functions?

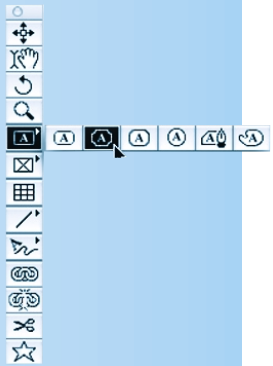
Measurement palettes These are the Measurements palettes from InDesign, top, and QuarkXpress, bottom, with some text selected. Both offer all the basics, but Quark wins for screen space-saving while InDesign adds other information, like the Paragraph Style and Story Language.



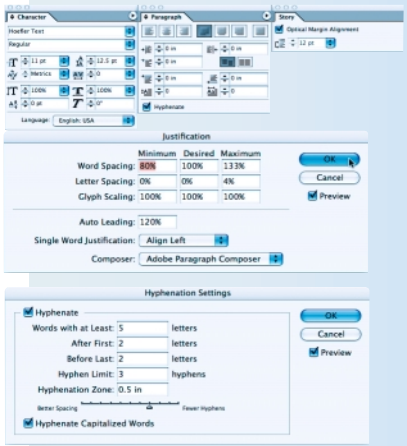


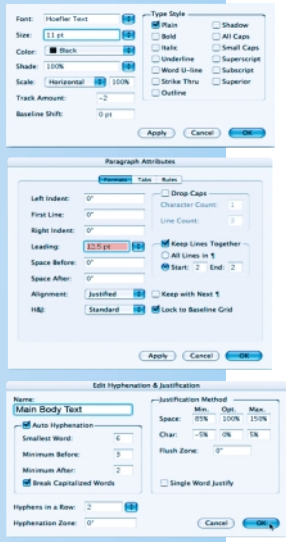
Tools While InDesign, left, offers more tools for illustration (looking a lot like Adobe Illustrator's toolbox), QuarkXpress, right, focuses on the basics and gets more uses out of each tool, resulting in a less cluttered look. Both toolboxes offer all the critical functions, but Adobe adds some marginally useful tools like the Pencil and Ruler tools as well as separate Box and Frame tools. Both can be filled with placed multi-column text or graphics or filled or stroked with colours or gradients.



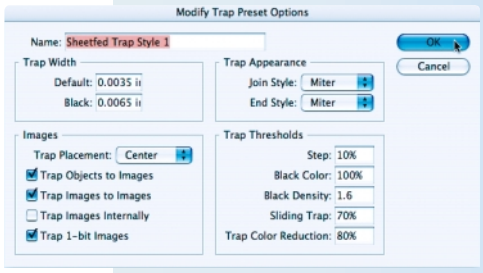


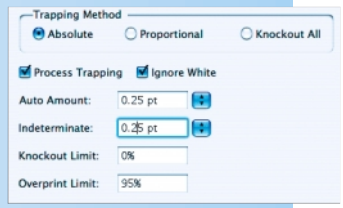
Typographic controls InDesign, left, puts most of the type controls in these top-three floating palettes rather than the dialog boxes favoured by QuarkXPress, right. When it comes to hyphenation and justification options to improve type flow, the programs have similar capabilities, although InDesign offers Optical Margin Adjustment—like hanging punctuation marks out into the gutters for a perfect right-hand margin in fully-justified text—and a handy slider to set hyphenation limits quickly with a live preview of the effect.





Trapping In this case there is no comparison, InDesign offers far more powerful and flexible trapping options—like sliding traps for objects on top of a changing colour background, trap corner and end effects, and colour reduction to reduce noticeable trap lines. Both programs can automatically trap simple objects, but user intervention is required in more complicated situations, especially where spot colours are used.





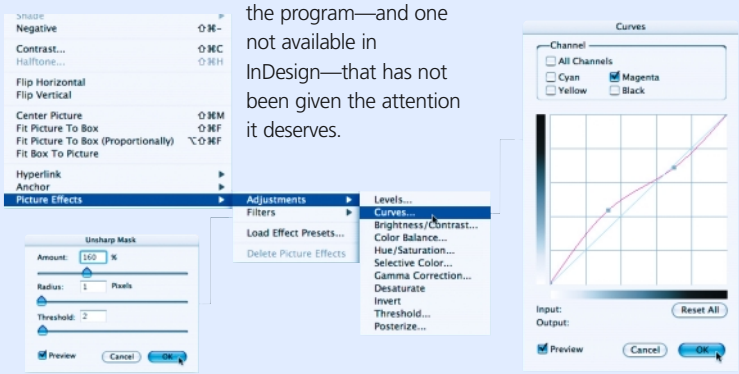
When opening v. 3.3 or 4.1 QXP files, most page items convert quite well, with some caveats. If you have text wrapped around a graphic in the QXP file, make sure to check 'Text Wrap Only Affects Objects Beneath' in the Composition area of IDCS's Preferences before opening the QXP file. Colour profiles applied to graphics in QXP are not converted, nor are any objects that depend on any Quark Xtension other than the standard ones that ship with the program. Remove these items before trying to convert the file.

A few other points to note. Trap information from objects in QXP files reverts to IDCS defaults. Non-standard page sizes sometimes get changed when opened in IDCS. Differences in hyphenation and justification between the programs can cause text to re-flow unpredictably. QXP Library files cannot be converted.

It's also a very good idea to move all linked or placed graphic files to the same folder as the PM or QXP files before opening it in IDCS or your graphic links may be lost.

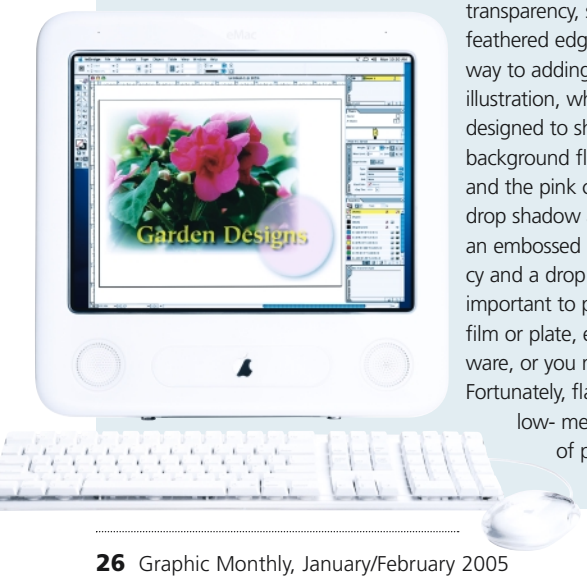
QuarkXPress

Coolest new feature in QuarkXPress Several new features have been added to QuarkXPress in versions 6 and 6.5, and several others are promised for version 7, which, as of this writing, is in beta testing. My own favourite new feature in the current version (6.5) is the new Picture Effects item in the Style menu when a placed pixel image is selected. This allows you to modify a placed photo right in QuarkXPress with many of the key controls you find in PhotoShop, like Levels, Curves, or Hue/Saturation. It also offers a number of the filter effects you find in PhotoShop as well, including Unsharp Mask and Despeckle. These controls are generally well-handled, and, while Quark's display of placed images is not up to the display in PhotoShop, these can be real time-savers for last-minute fixes on a tight schedule. This is a major feature to the program—and one not available in InDesign—that has not been given the attention it deserves.



Adobe InDesign

Coolest feature in InDesign CS Almost any object—text or graphic—created in InDesign or placed there, can have a number of alpha-channel mask effects applied to it, including variable transparency, smooth-edge drop shadows and smooth feathered edges. Properly handled, these can go a long way to adding dimension and polish to your work. This illustration, while unlikely to win any design awards, is designed to show all of these effects in one place. The background flower photo has a feathered-edge effect and the pink circle on the lower right has transparency, drop shadow and a feathered edge combined to give it an embossed glass effect. The text on top has transparency and a drop shadow. When using these effects, it is important to properly flatten the file before outputting to film or plate, especially if you work with older RIP software, or you may well choke the output device. Fortunately, flattening is easy: just pick a flattening style—low- medium- high-quality, depending on the sort of press and paper your job will be printed on—and save the file to EPS or PDF.



7 Get a bigger monitor. While IDCS has many more options and capabilities than QXP or PM, it also has a serious case of palette-itis, with a whopping 29 floating palettes—including the Toolbar—plus another six for web-page projects. I find that the minimum I need to work efficiently is 14 to 16, grouped into six or seven tabbed palettes. Even with the ability to save your workspace arrangement, to combine them into tabbed combination palettes, and to collapse or dock them to the sides of the screen, you'll still find any monitor with less than 1,280 x 1,024 pixels to be very, very crowded with IDCS. I'd recommend a 19" or larger monitor with at least 1,600 x 1,200 pixels for a good workspace on most projects. Another option is to use two 17" or larger monitors—one for the document and the other for the palettes. That's my preferred method for using most Adobe products.

8 You may need a faster computer. IDCS, like its brothers Illustrator and PhotoShop, wants a lot of processor speed and memory. If you don't have a 1GHz, or faster, G4/G5-based Mac (or a 2.8GHz, or faster, Pentium PC) with at least 768 Mb of RAM you'll find IDCS rather sluggish.

9 The cost of the software. A full retail copy of IDCS for Mac or PC comes with a street price of about $890—not bad when compared with QuarkXPress at about $1,220, but it can still add up if you have a lot of user seats. If you're upgrading from a recent version of PageMaker, the price drops to $429, and if you're upgrading from an earlier version of InDesign it drops again to $209. A special PageMaker edition of IDCS for $399 includes training and specialized software to help people moving from PM to IDCS. Unfortunately, Adobe's original cross-grade price for QXP users is no longer available.

10 Regardless of what program you're coming from, plan on at least a full week using IDCS before you really get up to speed and perhaps another couple of weeks before you're the speed demon you may have been in that older program.

Those are some of the things to watch when moving to InDesign. The good news? Once you're comfortable with InDesign you'll wonder how you ever got along without it. ■

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