Using
ADOBE® INCOPY® CS4

Adobe

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Using Adobe InCopy® CS4 for Windows® and Mac OS

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Chapter 1: Resources

Before you begin working with your software, take a few moments to read an overview of activation and the many resources available to you. You have access to instructional videos, plug-ins, templates, user communities, seminars, tutorials, RSS feeds, and much more.

Activation and registration

Help with installation

For help with installation issues, see the Installation Support Center at www.adobe.com/go/cs4install.

License activation

During the installation process, your Adobe software contacts Adobe to complete the license activation process. No personal data is transmitted. For more information on product activation, visit the Adobe website at www.adobe.com/go/activation.

A single-user retail license activation supports two computers. For example, you can install the product on a desktop computer at work and on a laptop computer at home. If you want to install the software on a third computer, first deactivate it on one of the other two computers. Choose Help > Deactivate.

Register

Register your product to receive complimentary installation support, notifications of updates, and other services.

❖ To register, follow the on-screen instructions in the Registration dialog box, which appears after you install the software.

If you postpone registration, you can register at any time by choosing Help > Registration.

Adobe Product Improvement Program

After you use your Adobe software a certain number of times, a dialog box may appear asking whether you want to participate in the Adobe Product Improvement Program.

If you choose to participate, data about your use of Adobe software is sent to Adobe. No personal information is recorded or sent. The Adobe Product Improvement Program only collects information about which features and tools you use and how often you use them.

You can opt in to or out of the program at any time:

- To participate, choose Help > Adobe Product Improvement Program and click Yes, Participate.
- To stop participating, choose Help > Adobe Product Improvement Program and click No, Thank You.

ReadMe

A ReadMe file for your software is available on-line and on the installation disc. Open the file to read important information about topics such as the following:

- System requirements
- Installation (including uninstalling the software)
- Activation and registration
- Font installation
- Troubleshooting
- Customer support
- Legal notices

Help and support

Community Help

Community Help is an integrated environment on Adobe.com that gives you access to community-generated content moderated by Adobe and industry experts. Comments from users help guide you to an answer.

Community Help draws on a number of resources, including:

- Videos, tutorials, tips and techniques, blogs, articles, and examples for designers and developers.
- Complete on-line product Help, which is updated regularly by the Adobe documentation team.
- All other content on Adobe.com, including knowledgebase articles, downloads and updates, Developer Connection, and more.

Choose Help > *product name* Help in the application to access the Help and Support page, the portal to all of the Community Help content for your product. You can also use the Help search field in some Creative Suite 4 applications, or press F1 (Windows), to access Community Help for your product.

The sites searched by the default Community Help search engine are hand-selected and reviewed for quality by Adobe and Adobe Community Experts. Adobe experts also work to ensure that the top search results include a mixture of different kinds of content, including results from on-line product Help.

For more information on using Community Help, see http://help.adobe.com/en_US/CommunityHelp/.

For a video overview of Community Help, see www.adobe.com/go/lrvid4117_xp.

Product Help

Adobe provides a comprehensive user guide for each product in several formats, including on-line product Help, PDF, and printed book. Results from on-line product Help are included in your results whenever you search Community Help.

If you're connected to the Internet, the Help menu within the product opens the product Help and Support page by default. This page is a portal to all of the Community Help content for the product. If you want to consult or search on-line product Help only, you can access it by clicking the product Help link in the upper-right corner of the Help and Support page. Be sure to select the **This Help System Only** option before you do your search.

If you're not connected to the Internet, the Help menu within the product opens local Help, a subset of the content available in on-line product Help. Because local Help is not as complete or up-to-date as on-line product Help, Adobe recommends that you use the PDF version of product Help if you want to stay offline. A downloadable PDF of complete product Help is available from two places:

- The product's Help and Support page (upper-right corner of the page)
- Local and web Help (top of the Help interface)

For more information on accessing product help, see http://help.adobe.com/en_US/CommunityHelp/.

If you are working in Adobe InDesign, Photoshop, Illustrator, Flash, Fireworks, or Dreamweaver, and you want to turn off Community Help so that local Help opens by default, do the following:

1 Open the Connections panel (Window > Extensions > Connections).

2 From the Connections panel menu , select Offline Options.

3 Select Keep Me Offline and click OK.

Note: *When you disable web services from the Connections panel, all other web services (such as Adobe Kuler and Adobe ConnectNow) are also disabled.*

Printed resources

Printed versions of the complete on-line product Help are available for the cost of shipping and handling at www.adobe.com/go/store.

Support resources

Visit the Adobe Support website at www.adobe.com/support to learn about free and paid technical support options.

Services, downloads, and extras

You can enhance your product by integrating a variety of services, plug-ins, and extensions in your product. You can also download samples and other assets to help you get your work done.

Adobe creative on-line services

Adobe® Creative Suite® 4 includes new on-line features that bring the power of the web to your desktop. Use these features to connect with the community, collaborate, and get more from your Adobe tools. Powerful creative on-line services let you complete tasks ranging from color matching to data conferencing. The services seamlessly integrate with desktop applications so you can quickly enhance existing workflows. Some services offer full or partial functionality when you're offline too.

Visit Adobe.com to learn more about available services. Some Creative Suite 4 applications include these initial offerings:

Kuler™ panel Quickly create, share, and explore color themes on-line.

Adobe® ConnectNow Collaborate with dispersed working teams over the web, sharing voice, data, and multimedia.

Resource Central Instantly access tutorials, sample files, and extensions for Adobe digital video applications.

For information on managing your services, see the Adobe website at www.adobe.com/go/learn_creativeservices_en.

Adobe Exchange

Visit the Adobe Exchange at www.adobe.com/go/exchange to download samples as well as thousands of plug-ins and extensions from Adobe and third-party developers. The plug-ins and extensions can help you automate tasks, customize workflows, create specialized professional effects, and more.

Adobe downloads

Visit www.adobe.com/go/downloads to find free updates, tryouts, and other useful software.

Adobe Labs

Adobe Labs at www.adobe.com/go/labs gives you the opportunity to experience and evaluate new and emerging technologies and products from Adobe. At Adobe Labs, you have access to resources such as these:

- Prerelease software and technologies
- Code samples and best practices to accelerate your learning
- Early versions of product and technical documentation
- Forums, wiki-based content, and other collaborative resources to help you interact with like-minded users.

Adobe Labs fosters a collaborative software development process. In this environment, customers quickly become productive with new products and technologies. Adobe Labs is also a forum for early feedback. The Adobe development teams use this feedback to create software that meets the needs and expectations of the community.

Adobe TV

Visit Adobe TV at http://tv.adobe.com to view instructional and inspirational videos.

Extras

The installation disc contains a variety of extras to help you make the most of your Adobe software. Some extras are installed on your computer during the setup process; others are located on the disc.

To view the extras installed during the setup process, navigate to the application folder on your computer.

- Windows®: *[startup drive]*\Program Files\Adobe*[Adobe application]*
- Mac OS®: *[startup drive]*/Applications/*[Adobe application]*

To view the extras on the disc, navigate to the Goodies folder in your language folder on the disc. Example:

- /English/Goodies/

What's new

Choose Window > Workspace > [What's New] to highlight menu commands of new and enhanced features.

For more information on new Adobe InCopy CS4 features, see www.adobe.com/go/ic_newfeatures_en.

Text and tables improvements

Conditional text

Use conditional text to deliver multiple versions of a document for different users and channels. Create conditions and apply them to text for audience customization. If you hide conditions, the remaining text and anchored objects reflow automatically in your layout. See "Use conditional text" on page 99.

Hyperlinks

Use the Hyperlinks panel to create hyperlinks that navigate to external URLs, link to files with supplemental information, launch an e-mail client, or jump to a page or section of a page within the same or even a different document. Verify your hyperlinks directly in InCopy CS4. See "Hyperlinks" on page 142.

Cross-references

Insert and edit cross-references. Choose among different formats, or create your own. Cross-references are easily updated when page numbering changes. See "Cross-references" on page 148.

All language user dictionary

Add a custom word, name, or phrase to a user dictionary and all languages treat the term as correctly spelled. See "Add words to dictionaries" on page 160.

Thesaurus improvement

A selected word is automatically loaded when you open the Thesaurus panel.

Autocorrect editing

Edit entries on your Autocorrect misspelling list without having to delete and add entries.

Tables in Story/Galley view

Tables in the Story View and Galley View display text in sequential columns and rows for easy editing.

Apply changes to cell and table borders without reselecting the stroke proxy borders.

Add notes in tables

Add inline notes in tables to collaborate more effectively. Store alternate text, designer communications, and other annotations in notes linked to specific text in a table.

Track changes in tables

Changes to text in tables can now be tracked just like text outside tables.

Nested line styles

Use nested line styles to apply complex character formatting through the end of a line. Formatting remains unchanged when text is edited. See "Create nested line styles" on page 177.

Style creation in context

In dialog boxes where you can select a character or paragraph style, you can create a style without having to exit the dialog box. This ability is especially useful when you're generating a table of contents, creating nested styles, or using Find/Change to change text formatting to a style.

GREP styles

Apply character styles to any text in a paragraph that matches the GREP expression you specify. See "Create GREP styles" on page 180.

Text stroke control

Adjust stroke cap, end join, miter limit, and stroke alignment on text without having to convert characters to outlines. These stroke options are available in paragraph and character styles.

Productivity enhancements

Spread view rotation

Adobe InDesign users can rotate the spread view temporarily at 90- and 180-degree angles. The ability to rotate spread views is especially important for working on non-horizontal design elements, such as rotated calendar spreads and tables. InCopy users can view a rotated spread in managed files. InDesign users control whether the spread is rotated or cleared of its rotation.

Facing Pages option

When creating standalone documents, you can turn off the Facing Pages option to work in a document with single-page spreads.

New XML-based file formats

Many of the filename extensions have changed based on the new markup language.

File type	CS3 extension	CS4 extension
Assignment files	.inca	.icma
Content files	.incx	.icml
Exported files	.incx	.icml
Package files for InCopy	.incp	.icap
Package files for InDesign	.indp	.idap
InCopy template files	.inct	.icmt

Adobe Services

Adobe community Help Get help from the biggest talent pool out there, quickly, with targeted searches.

ConnectNow Collaborate with clients, colleagues, and vendors by sharing your desktop so that you can quickly complete group reviews and show your work with ease. Choose File > Share My Screen.

Assignments improvements

New assignment operations are now enabled for unsaved InDesign documents. You are now prompted to save the document.

The Assignments panel also included different options to update assignments. These options include Selected, Out-of-Date, and All. The All option updates all assignments, including those that aren't out of date, thereby letting you view design changes that don't affect the composition of assignment text.

Edit Original flexibility

Use the Edit With command to choose which application to use to edit a placed item instead of relying on the operating system to default to the appropriate program. See "Edit original artwork" on page 57.

Integration with Adobe Bridge CS4

Browse, organize, label, and preview graphics and InDesign documents, templates, and snippets in Adobe Bridge. Drag and drop assets from Adobe Bridge into layouts easily and efficiently. Search for files using metadata that specifies keywords, fonts, colors, and more. See "About Adobe Bridge" on page 36.

Integration with Adobe Version Cue CS4

Connect to Version Cue Server projects using Adobe Drive. The connected server appears like a hard drive or mapped network drive in Windows Explorer, Mac OS Finder, and in dialog boxes such as Open and Save As. See "Adobe Version Cue" on page 38.

Locked story enhancements

If a story is locked, you can still view character and paragraph information for a text selection. It's no longer necessary to check out the story or copy and paste to a different story to view this information.

User interface enhancements

Versatile Links panel

Find, sort, and organize placed content with the redesigned Links panel. Scan link attributes and click to view details such as scale, rotation, and resolution. Customize the Links panel to suit your working preferences.

Quickly replace low-resolution images used as placeholders with high-resolution images based on filename. Filename extensions are ignored. Simply relink to a new folder. See "Links panel overview" on page 52.

Customized workspace enhancements

Select from a number of established task-based workspaces that unclutter your screen and present only the menu commands and panel arrangements best for the current task. Customize your own menus and workspaces that can be shared and saved. See "Save and switch workspaces" on page 15.

Tabbed documents

Manage and work across multiple documents by tabbing through open documents to find the one you need without having to maximize each document individually. See "Manage Document windows" on page 12.

N-up view

Arrange viewing multiple documents in a single window so that you can compare content and drag objects across documents. Use a button to switch your views side by side, top and bottom, or however you want.

Application frame (Mac OS)

For Mac OS users, you have the option to work with documents and panels in a single window. Move or resize the window without losing access to panels or other opened documents. See "Workspace overview" on page 9.

Application bar

Use new control buttons in the menu bar to switch to a new workspace, modify the view of a document, perform a search, or quickly open Adobe Bridge CS4.

More nudge buttons

Use the Up and Down arrow keys to nudge values for paragraph and character styles, find/change formats, color, and more.

Dialog box positioning

Dialog boxes open in the same screen location in which they were closed.

Power zoom

Use the Hand tool to zoom out by holding down your mouse button. Continue to hold, and you can move the zoom area marquee across pages. Release, and the view returns to your original zoom level in your new location. Increase or decrease the size of the zoom area marquee using the Up and Down arrow keys or scroll wheel on the mouse. See "Use power zoom" on page 26.

Chapter 2: Workspace

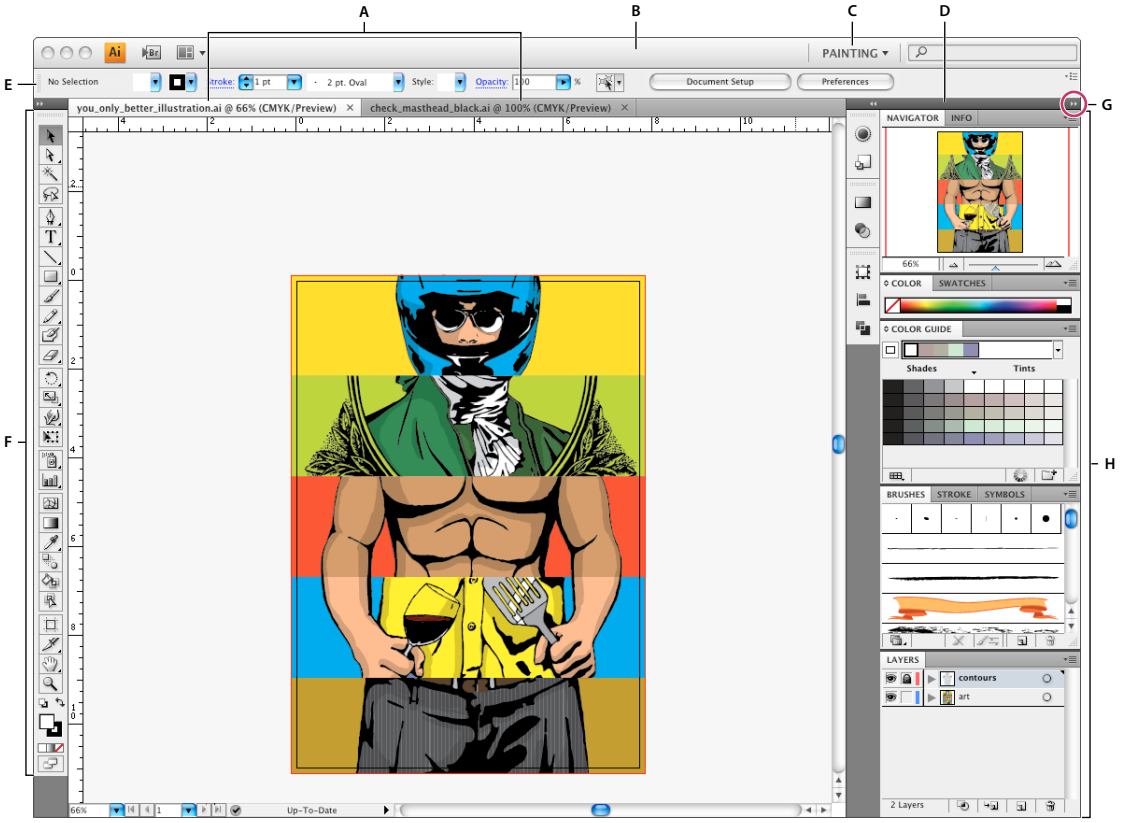
The Adobe® InCopy® workspace is arranged to help you focus on writing content. When you first start InCopy, you see the default workspace, which you can customize to suit your needs.

Workspace basics

Workspace overview

You create and manipulate your documents and files using various elements, such as panels, bars, and windows. Any arrangement of these elements is called a *workspace*. The workspaces of the different applications in Adobe® Creative Suite® 4 share the same appearance so that you can move between the applications easily. You can also adapt each application to the way you work by selecting from several preset workspaces or by creating one of your own.

Although the default workspace layout varies in different products, you manipulate the elements much the same way in all of them.



Default Illustrator workspace
A. *Tabbed Document windows* ***B.*** *Application bar* ***C.*** *Workspace switcher* ***D.*** *Panel title bar* ***E.*** *Control panel* ***F.*** *Tools panel* ***G.*** *Collapse To Icons button* ***H.*** *Four panel groups in vertical dock*

- The *Application bar* across the top contains a workspace switcher, menus (Windows only), and other application controls. On the Mac for certain products, you can show or hide it using the Window menu.
- The *Tools panel* contains tools for creating and editing images, artwork, page elements, and so on. Related tools are grouped.
- The *Control panel* displays options for the currently selected tool. The Control panel is also known as the options bar in Photoshop. (Adobe Flash®, Adobe Dreamweaver®, and Adobe Fireworks® have no Control panel.)
- Flash, Dreamweaver, and Fireworks have a *Property inspector* that displays options for the currently selected element or tool.
- The *Document window* displays the file you're working on. Document windows can be tabbed and, in certain cases, grouped and docked.
- *Panels* help you monitor and modify your work. Examples include the Timeline in Flash, the Layers panel in Adobe Photoshop®, and the CSS Styles panel in Dreamweaver. Panels can be grouped, stacked, or docked.

- On the Mac, the *Application frame* groups all the workspace elements in a single, integrated window that lets you treat the application as a single unit. When you move or resize the Application frame or any of its elements, all the elements within it respond to each other so none overlap. Panels don't disappear when you switch applications or when you accidentally click out of the application. If you work with two or more applications, you can position each application side by side on the screen or on multiple monitors. If you prefer the traditional, free-form user interface of the Mac, you can turn off the Application frame. In Adobe Illustrator®, for example, select Window > Application Frame to toggle it on or off. (In Flash, the Application frame is on permanently. Dreamweaver does not use an Application frame.)

Hide or show all panels

- (Illustrator, Adobe InCopy®, Adobe InDesign®, Photoshop, Fireworks)To hide or show all panels, including the Tools panel and Control panel, press Tab.
- (Illustrator, InCopy, InDesign, Photoshop) To hide or show all panels except the Tools panel and Control panel, press Shift+Tab.

  You can temporarily display hidden panels if Auto-Show Hidden Panels is selected in Interface preferences. It's always on in Illustrator. Move the pointer to the edge of the application window (Windows®) or to the edge of the monitor (Mac OS®) and hover over the strip that appears.

- (Flash, Dreamweaver, Fireworks) To hide or show all panels, press F4.

Display panel options

❖ Click the panel menu icon in the upper-right corner of the panel.

You can open a panel menu even when the panel is minimized.

(Illustrator) Adjust panel brightness

❖ In User Interface preferences, move the Brightness slider. This control affects all panels, including the Control panel.

Reconfigure the Tools panel

You can display the tools in the Tools panel in a single column, or side by side in two columns. (This feature is not available in the Tools panel in Fireworks and Flash.)

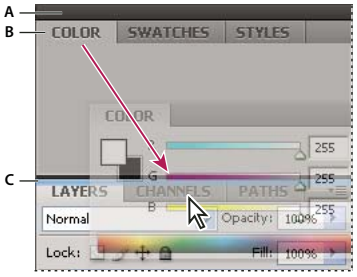
In InDesign and InCopy, you also can switch from single-column to double-column (or single-row) display by setting an option in Interface preferences.

❖ Click the double arrow at the top of the Tools panel.

Manage windows and panels

You can create a custom workspace by moving and manipulating Document windows and panels. You can also save workspaces and switch among them.

Note: *The following examples use Photoshop for demonstration purposes. The workspace behaves the same in all the products.*



Narrow blue drop zone indicates Color panel will be docked on its own above the Layers panel group.
A. *Title bar* ***B.*** *Tab* ***C.*** *Drop zone*

In Photoshop, you can change the font size of the text in the Control panel, in the panels, and in tool tips. Choose a size from the UI Font Size menu in Interface preferences.

Manage Document windows

When you open more than one file, the Document windows are tabbed.

- To rearrange the order of tabbed Document windows, drag a window's tab to a new location in the group.
- To undock a Document window from a group of windows, drag the window's tab out of the group.
- To dock a Document window to a separate group of Document windows, drag the window into the group.

  Note: *Dreamweaver does not support docking and undocking Document windows. Use the Document window's Minimize button to create floating windows.*

- To create groups of stacked or tiled documents, drag the window to one of the drop zones along the top, bottom, or sides of another window. You can also select a layout for the group by using the Layout button on the Application bar.

  Note: *Some products do not support this functionality. However, your product may have Cascade and Tile commands in the Window menu to help you lay out your documents.*

- To switch to another document in a tabbed group when dragging a selection, drag the selection over the document's tab for a moment.

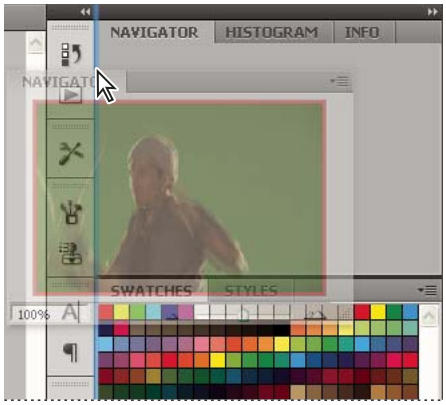
  Note: *Some products do not support this functionality.*

Dock and undock panels

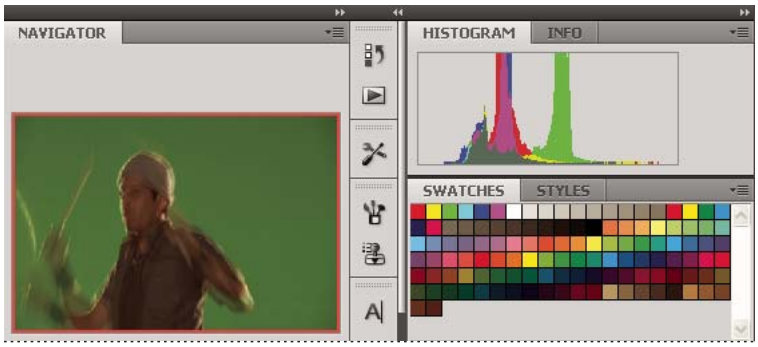
A *dock* is a collection of panels or panel groups displayed together, generally in a vertical orientation. You dock and undock panels by moving them into and out of a dock.

Note: *Docking is not the same as stacking. A stack is a collection of floating panels or panel groups, joined top to bottom.*

- To dock a panel, drag it by its tab into the dock, at the top, bottom, or in between other panels.
- To dock a panel group, drag it by its title bar (the solid empty bar above the tabs) into the dock.
- To remove a panel or panel group, drag it out of the dock by its tab or title bar. You can drag it into another dock or make it free-floating.



Navigator panel being dragged out to new dock, indicated by blue vertical highlight



Navigator panel now in its own dock

You can prevent panels from filling all the space in a dock. Drag the bottom edge of the dock up so it no longer meets the edge of the workspace.

Move panels

As you move panels, you see blue highlighted *drop zones*, areas where you can move the panel. For example, you can move a panel up or down in a dock by dragging it to the narrow blue drop zone above or below another panel. If you drag to an area that is not a drop zone, the panel floats freely in the workspace.

- To move a panel, drag it by its tab.
- To move a panel group or a stack of floating panels, drag the title bar.

Press Ctrl (Windows) or Command (Mac OS) while moving a panel to prevent it from docking. Press Esc while moving the panel to cancel the operation.

Note: *The dock is stationary and can't be moved. However, you can create panel groups or stacks and move them anywhere.*

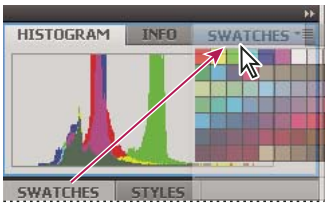
Add and remove panels

If you remove all panels from a dock, the dock disappears. You can create a dock by moving panels to the right edge of the workspace until a drop zone appears.

- To remove a panel, right-click (Windows) or Control-click (Mac) its tab and then select Close, or deselect it from the Window menu.
- To add a panel, select it from the Window menu and dock it wherever you want.

Manipulate panel groups

- To move a panel into a group, drag the panel's tab to the highlighted drop zone in the group.

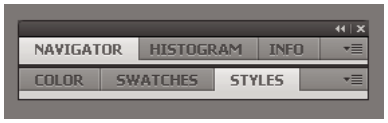


Adding a panel to a panel group

- To rearrange panels in a group, drag a panel's tab to a new location in the group.
- To remove a panel from a group so that it floats freely, drag the panel by its tab outside the group.
- To move a group, drag the title bar (the area above the tabs).

Stack floating panels

When you drag a panel out of its dock but not into a drop zone, the panel floats freely. The floating panel allows you to position it anywhere in the workspace. You can stack floating panels or panel groups so that they move as a unit when you drag the topmost title bar. (Panels that are part of a dock cannot be stacked or moved as a unit in this way.)



Free-floating stacked panels

- To stack floating panels, drag a panel by its tab to the drop zone at the bottom of another panel.
- To change the stacking order, drag a panel up or down by its tab.

  Note: *Be sure to release the tab over the narrow drop zone between panels, rather than the broad drop zone in a title bar.*

- To remove a panel or panel group from the stack, so that it floats by itself, drag it out by its tab or title bar.

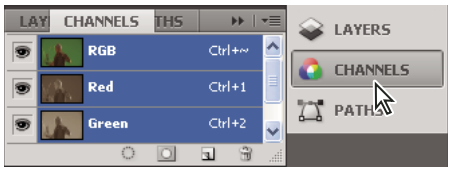
Resize panels

- To minimize or maximize a panel, panel group, or stack of panels, double-click a tab. You can also single-click the tab area (the empty space next to the tabs).
- To resize a panel, drag any side of the panel. Some panels, such as the Color panel in Photoshop, cannot be resized by dragging.

Manipulate panels collapsed to icons

You can collapse panels to icons to reduce clutter on the workspace. In some cases, panels are collapsed to icons in the default workspace.

Panels collapsed to icons



Panels expanded from icons

- To collapse or expand all panel icons in a dock, click the double arrow at the top of the dock.
- To expand a single panel icon, click it.
- To resize panel icons so that you see only the icons (and not the labels), adjust the width of the dock until the text disappears. To display the icon text again, make the dock wider.
- To collapse an expanded panel back to its icon, click its tab, its icon, or the double arrow in the panel's title bar.

  In some products, if you select Auto-Collapse Icon Panels from the Interface or User Interface Options preferences, an expanded panel icon collapses automatically when you click away from it.

- To add a floating panel or panel group to an icon dock, drag it in by its tab or title bar. (Panels are automatically collapsed to icons when added to an icon dock.)
- To move a panel icon (or panel icon group), drag the icon. You can drag panel icons up and down in the dock, into other docks (where they appear in the panel style of that dock), or outside the dock (where they appear as floating, expanded panels).

Restore the default workspace

- Select the default, Essentials workspace from the workspace switcher in the Application bar.
- (Photoshop) Select Window > Workspace > Essentials (Default).
- (InDesign, InCopy) Select Window > Workspace > Reset *[Workspace Name]*.

Save and switch workspaces

By saving the current size and position of panels as a named workspace, you can restore that workspace even if you move or close a panel. The names of saved workspaces appear in the workspace switcher in the Application bar.

In Photoshop, the saved workspace can include a specific keyboard shortcut set and menu set.

Save a custom workspace

1 With the workspace in the configuration you want to save, do one of the following:

- (Photoshop, Illustrator) Choose Window > Workspace > Save Workspace.
- (InDesign, InCopy) Choose Window > Workspace > New Workspace.
- (Dreamweaver) Choose Window > Workspace Layout > New Workspace.
- (Flash) Choose New Workspace from the workspace switcher in the Application bar.
- (Fireworks) Choose Save Current from the workspace switcher in the Application bar.

2 Type a name for the workspace.

3 (Photoshop, InDesign) Under Capture, select one or more options:

Panel Locations Saves the current panel locations.

Keyboard shortcuts Saves the current set of keyboard shortcuts (Photoshop only).

Menus Saves the current set of menus.

4 Click OK or Save.

Display or switch workspaces

❖ Select a workspace from the workspace switcher in the Application bar.

In Photoshop, you can assign keyboard shortcuts to each workspace to navigate among them quickly.

Delete a custom workspace

- Select Manage Workspaces from the workspace switcher in the Application bar, select the workspace, and then click Delete. (The option is not available in Fireworks.)
- (Photoshop, InDesign, InCopy) Select Delete Workspace from the workspace switcher.
- (Illustrator) Choose Window > Workspace > Manage Workspaces, select the workspace, and then click the Delete icon.
- (InDesign) Choose Window > Workspace > Delete Workspace, select the workspace, and then click Delete.

(Photoshop) Start with the last or default panel locations

When you start Photoshop, panels can either appear in their original default locations, or appear as you last used them.

In Interface preferences:

- To display panels in their last locations on startup, select Remember Panel Locations.
- To display panels in their default locations on startup, deselect Remember Panel Locations.

Change Interface preferences

1 Choose Edit > Preferences > Interface (Windows) or InCopy > Preferences > Interface (Mac OS).

2 Choose the settings you want to specify, and click OK.

Tool Tips Tool tips appear when you hold the mouse pointer over interface items such as tools in the toolbar and options in the Control panel. Choose None to turn off tool tips.

Show Thumbnails On Place When you place a graphic, a thumbnail of the image appears in the loaded graphics cursor. Similarly, a thumbnail of the first few lines of text appears in the loaded text cursor. Deselect this option if you don't want thumbnails to appear when placing graphics or text.

Show Transformation Values When you're creating, sizing, or rotating an object, the cursor displays the [x,y] coordinates, width and height, or rotation information.

Floating Tools Panel Specify whether the toolbar appears as a single column, double column, or single row.

Auto-Collapse Icon Panels When this option is selected, clicking the document window closes the open panel automatically.

Auto-Show Hidden Panels When you hide panels by pressing Tab, holding the mouse pointer over the side of the document window temporarily reveals the panels if this option is selected. If this option is not selected, you must press Tab again to display panels.

Open Documents As Tabs When this option is deselected, documents you create or open appear as floating windows rather than tabbed windows.

Enable Floating Document Window Docking If this option is selected, you can dock floating documents with each other as tabbed windows. If this option is deselected, floating document windows aren't docked with other document windows, unless you hold down the Control key while dragging.

Use toolbars

The basic toolbars contain buttons for many commonly used tools and commands, such as opening, saving, printing, scrolling, and zooming. Tool tips identify each tool button.

Show or hide a toolbar

❖ Choose the toolbar name from the Window menu. A check mark appears next to the toolbar name if it's currently visible.

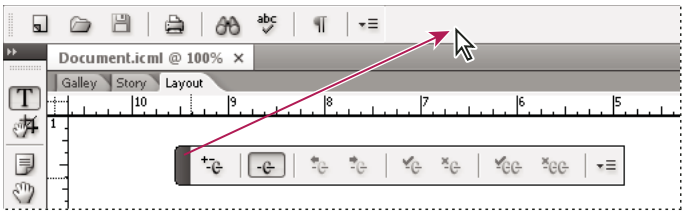
Customize a toolbar

You can specify which tools appear on a toolbar, change the toolbar orientation, and combine or separate toolbars.

❖ Do any of the following:

- To specify which tools appear on a toolbar, click the triangle at the end of the toolbar, select Customize, and select tools. The menu contains options specific to the toolbar.
- To move a toolbar, drag its title bar.
- To combine toolbars, click the gripper area of a toolbar, and drag the toolbar on top of another or along the same edge of the application window (Windows®) or screen (Mac OS®).

Gripper area of the toolbar



Combining toolbars

- To switch a toolbar to a floating panel, click the gripper area of the toolbar and drag the toolbar away from the edge of the application window (Windows) or screen (Mac OS).

- To separate a grouped toolbar, click the gripper area of the toolbar, and drag the toolbar away from the group. Dragging a toolbar out of an existing group creates a new toolbar.

Use context menus

Unlike the menus that appear at the top of your screen, context-sensitive menus display commands related to the active tool or selection. You can use context menus as a quick way to choose commonly used commands.

1 Position the pointer over the document, object, or panel.

2 Click the right mouse button.

Note: *(Mac OS) If you don't have a two-button mouse, you can display a context menu by pressing the Control key as you click with the mouse.*

Customize menus

Hiding and colorizing menu commands is a way to remove menu clutter and emphasize commands you frequently use. Note that hiding menu commands simply removes the menu command from view; it doesn't disable any features. At any time, you can view hidden commands by selecting the Show All Menu Items command at the bottom of a menu, or you can choose Window > Workspace > Show Full Menus to show all the menus for the selected workspace. You can include customized menus in workspaces you save.

You can customize the main menu, context menus, and panel menus. Context menus appear when you right-click (Windows) or Control-click (Mac OS) an area. Panel menus appear when you click the icon in the upper right of a panel.

See also

"Save a custom workspace" on page 16

Create a custom menu set

1 Choose Edit > Menus.

You cannot edit the default menu set.

2 Click Save As, type the name of the menu set, and click OK.

3 From the Category menu, choose Application Menus or Context & Panel Menus to determine which menus are customized.

4 Click the arrows to the left of the menu categories to display subcategories or menu commands. For each command you want to customize, click the eye icon under Visibility to show or hide the command; click None under Color to select a color from the menu.

5 Click Save, and then click OK.

Select a custom menu set

1 Choose Edit > Menus.

2 Choose the menu set from the Set menu, and then click OK.

Edit or delete a custom menu set

1 Choose Edit > Menus.

2 Choose the menu set from the Set menu, and then do one of the following:

- To edit a menu set, change the visibility or color of menu commands, click Save, and then click OK.
- To delete a menu set, click Delete and then click Yes. If you've modified the menu set without saving it, you're prompted to save the current menu set. Click Yes to save the menu set, or click No to discard changes.

Show hidden menu items

- Choose Window > Workspace > Show Full Menus. This command turns on all menus for the selected workspace. You can hide the menus again by resetting the workspace.
- Choose Show All Menu Items at the bottom of the menu that includes hidden commands.

Holding down Ctrl (Windows) or Command (Mac OS) and clicking a menu name temporarily displays any menu commands you've hidden by customizing menus.

Use keyboard shortcut sets

InCopy provides keyboard shortcuts for many menu commands, options, scripts, and controls. You can also define your own keyboard shortcuts. Using the Keyboard Shortcuts dialog box, you can:

- Choose the set you want to use.
- View existing shortcut commands.
- Generate a complete list of shortcuts.
- Create your own shortcuts and shortcut sets.
- Edit current shortcuts.

  The Keyboard Shortcuts dialog box also lists all commands that can accept shortcuts but don't have shortcuts defined for them in the default shortcut set.

See also

"Keyboard shortcuts" on page 277

Change the active shortcut set

1 Choose Edit > Keyboard Shortcuts.

2 Select a shortcut set from the Set menu.

3 Click OK.

View shortcuts

1 Choose Edit > Keyboard Shortcuts.

2 For Set, select a shortcut set.

3 For Product Area, select the area containing the commands you want to view.

4 From Commands, select a command. The shortcut appears in the Current Shortcuts section.

Generate a list of shortcuts

1 Choose Edit > Keyboard Shortcuts.

2 Select a shortcut set from the Set menu.

3 Click Show Set.

A text file opens with all current and undefined shortcuts for that set.

Create a new shortcut set

1 Choose Edit > Keyboard Shortcuts.

2 Click New Set.

3 Type a name for the new set, select a shortcut set from the Based On Set menu, and click OK.

Create or redefine a shortcut

1 Choose Edit > Keyboard Shortcuts.

2 For Set, select a shortcut set, or click New Set to create a new shortcut set.

Note: *You can make changes to the Default shortcut set, but it's not recommended. Instead, edit a copy of the Default shortcut set.*

3 For Product Area, select the area containing the command you want to define or redefine.

4 In the Commands list, select the command you want to define or redefine.

5 Click inside the New Shortcut box and press the keys for your new keyboard shortcut. If the key sequence is currently used for another command, InCopy displays that command under Current Shortcuts. You can change the original shortcut also, or try another shortcut.

Important: *Assigning single-key shortcuts to menu commands interferes with entering text. If an insertion point is active when you type a single-key shortcut, InCopy carries out the command instead of inserting the character.*

6 Do one of the following:

- Click Assign to create a new shortcut where none currently exists.
- Click Assign to add another shortcut to the command.

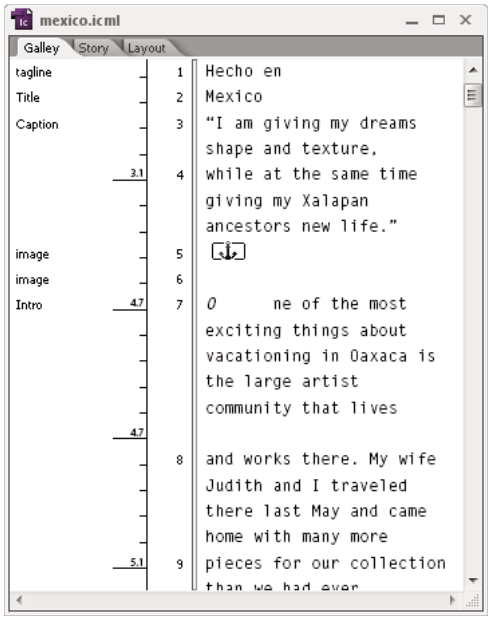
7 Click OK to close the dialog box, or click Save to keep the dialog box open and enter more shortcuts.

Viewing stories

Galley, Story, and Layout view overview

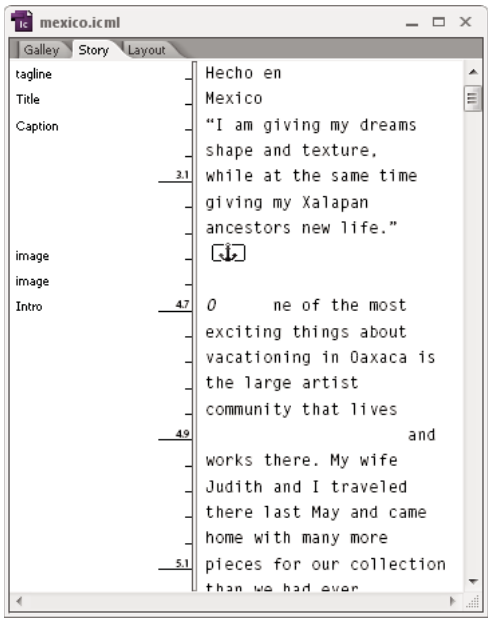
InCopy offers three views of a story: Galley, Story, and Layout. These terms correspond to the terms used in traditional publishing.

Galley view Displays text with line breaks established in the corresponding Adobe InDesign® document. If text doesn't fit into the assigned layout space, an overset indicator marks the point at which the InCopy text exceeds the space. Although you can use InCopy to apply formatting, such as paragraph indents and font size, these formats don't appear in Galley view.



Galley view

Story view Displays text in a continuous stream, wrapping the text at the document window. Story view doesn't show accurate line endings, so you can concentrate on content. However, if text doesn't fit into the assigned layout space, an overset indicator marks the point at which the InCopy text exceeds the space. In Story view, the information area displays only paragraph styles. Line numbers aren't visible in Story view.



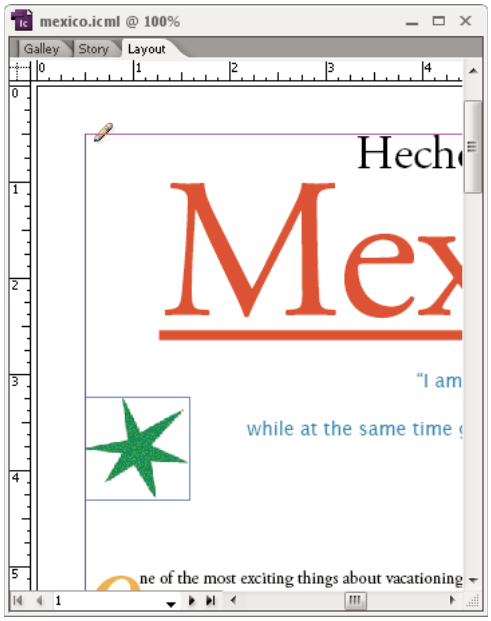
Story view

Story view opens by default when you create a new InCopy story.

To change the default view for new documents, close all documents and select the view you want as the default from the View menu.

Layout view Displays text as it will print, with all formatting. When you use InCopy to synchronize with an InDesign layout, you can view text in context with all other page elements in the InDesign document—frames, columns, graphics, and so on.

In Layout view, you can zoom in and out to inspect different aspects of the layout.



Layout view

See also

"Layout view overview" on page 24

"Keys for navigating through documents" on page 277

Switch between Galley, Story, or Layout view

❖ Do either of the following:

- Choose the view from the View menu.
- Click the Galley, Story, or Layout tab at the top of the editing area.

About Galley view

Galley view provides an environment for efficient text processing; text is easy to read and annotate. You can also use Galley view to perform copyfitting and other production-related tasks.

When you open an InDesign document in InCopy, working in Galley view is analogous to working with galley proofs in traditional typesetting. Within the viewing area, the text wraps exactly as it will in the final InDesign layout, and all text is displayed in one column, regardless of how many columns exist in the layout. Page breaks, frame breaks, and column breaks are shown by a line with the words "Page break," "Frame break," or "Column break" in the center of the line.

Note: *When multiple breaks are represented by a single boundary, such as a page break coinciding with a frame break, the break with the highest priority is displayed. Page breaks have the highest priority, and column breaks have the lowest.*

Galley view includes the Copyfit break feature, which indicates the point at which the InCopy text exceeds the layout space assigned for it in InDesign.

By default, Galley view displays text at 12 points. You can change the font, size, or spacing to make text easier to read or edit. You can also change the background and font colors.

Note: *The font display size applies to all stories, rather than individual characters, words, or paragraphs.*

The Galley & Story Appearance toolbar at the bottom of the workspace controls several settings that you might want to change frequently when working on a document. These settings include:

- Display font type and size
- Display leading (single space, 150% space, double space, or triple space)
- Show/hide line number and styles columns
- Customize Galley & Story Appearance controls

See also

"Editing overset text" on page 156

Customize Galley and Story views

You can customize Galley and Story views in a variety of ways.

Change the Galley view display settings

❖ Select an option from the Galley & Story Appearance toolbar. (If the toolbar is hidden, choose Window > Galley & Story Appearance. The toolbar appears at the bottom of the application window by default.)

Note: *It's important to understand the difference between changing the font display size and applying text formatting. Both can be done in Galley view. Changing the font display size doesn't affect the way text looks in a publication, whereas applying text formatting does change the text appearance in Layout view and in the published document.*

Set Galley view display preferences

1 Choose Edit > Preferences > Galley & Story Display (Windows) or InCopy > Preferences > Galley & Story Display (Mac OS).

2 In the Text Display Options section, specify the following:

Text Color Controls text color in the viewing area. Black is the default text color.

Background Controls the background color of the viewing area. White is the default background color.

Theme Assigns preset text and background colors.

Override Preview Font Enables you to display one additional font using the correct typeface in the Galley and Story view. InCopy automatically displays the Symbol, Zapf Dingbats, Webdings, and Wingdings® fonts accurately, overriding the display font you've chosen.

Enable Anti-aliasing Smooths the jagged edges of type and bitmap images by softening the color transition between edge pixels and background pixels. Because only the edge pixels change, no detail is lost. You can choose the level of anti-aliasing to apply. The Default option uses shades of gray to smooth text. The LCD Optimized option uses colors, rather than shades of gray, and works best on light-colored backgrounds with black text. The Soft option uses shades of gray, but produces a lighter, fuzzier appearance.

Cursor Options Controls the cursor display. Choose from four different cursors. Select or deselect Blink.

Note: *Any settings made in the Galley & Story Display section apply to both the Galley and Story views.*

Show or hide the information column

The information column appears on the left side of the document window in Galley and Story views. This column contains read-only information about paragraph styles, line numbers, and the vertical depth of text; you cannot type in this area.

❖ Do one of the following:

- To change the view in the current document only, choose View > Show Info Column or View > Hide Info Column.
- To change the default view in the application, close all documents, and choose View > Show Info Column or View > Hide Info Column.

Note: *Paragraph styles make it much easier to maintain consistency in your publications. Consult any workflow documentation your team has adopted concerning in-house guidelines for your project.*

Set Story view preferences

Use the Galley & Story Display section of the Preferences dialog box to customize the display of the Story view.

1. Choose Edit > Preferences > Galley & Story Display (Windows) or InCopy > Preferences > Galley & Story Display (Mac OS).
2. Specify the options you want.
3. Click OK.

Show or hide paragraph break marks

You can show or hide paragraph break marks in Galley and Story view. An arrow symbol indicates the start of a new paragraph.

❖ Choose View > Show Paragraph Break Marks or View > Hide Paragraph Break Marks.

Use the vertical depth ruler

When you type text, it's sometimes useful to know the physical depth of a story as it will appear in Layout view, in addition to the number of lines. The vertical depth ruler draws a ruler along the left edge of the Galley and Story views. Each tick mark in the ruler aligns to the bottom of a line of text. A value is displayed every five tick marks to show the total vertical depth of the text to that point. The depth is updated dynamically when layout composition for the portion of the document is complete.

The depth measurement uses the vertical units setting in Units & Increments preferences.

Note: *To aid in copyfitting, the depth of overset text is also calculated and displayed.*

1. Click the Galley or Story tab at the top of the editing area.
2. Do either of the following:

- To show or hide the depth ruler, choose View > Show/Hide Depth Ruler.
- To show or hide the information column, choose View > Show/Hide Info Column.

Layout view overview

In Layout view, you see text and other elements exactly as they are formatted and positioned in an InDesign document. Stories are laid out in frames, just as they appear in InDesign.

If you work with a *linked* story—a managed story within an open InDesign document or assignment file—you cannot modify the story layout with InCopy. You can work only with the text and text attributes.

If you work with a *stand-alone* InCopy document—an individual InCopy document that isn't within an open InDesign document or assignment file—you can work with the text and text attributes, and you can change the page size using the Document Setup command.

Layout view offers more tools and View-menu commands than the other views. You can use the Hand tool, the Zoom tool, and the Zoom commands to view a spread at various magnifications. You can also use various layout aids, such as rulers, document grids, and baseline grids.

Note: *These viewing options don't affect formatting. For example, zooming in to enlarge your view of the page doesn't change the way the story appears in InDesign or when printed.*

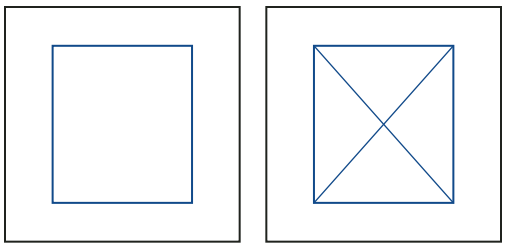
About frames

In the Layout view of a document in progress, you see one or more boxes on the page. These nonprinting boxes might contain text, graphics, or nothing. The boxes represent *frames*—spaces in the layout reserved for specific elements. Each frame is defined to contain either text or a graphic. Non-managed stories in an InDesign document or in an assignment file are dimmed so that they can be identified easily.

Text frames Control which stories appear where, and how much page area they cover. For linked stories, frames are defined by the InDesign user. If multiple frames are set aside for a story, the frame configuration determines how the story text flows through the layout.

Graphics frames Can function as borders and background, and can crop or mask graphics. You can work with graphics inside frames in InCopy, and you can see the graphics frames from InDesign layouts when you work with linked documents. You can also work with the frames of inline graphics (embedded in text), but you cannot work with other graphics frames. (See "Create an inline graphic" on page 48.)

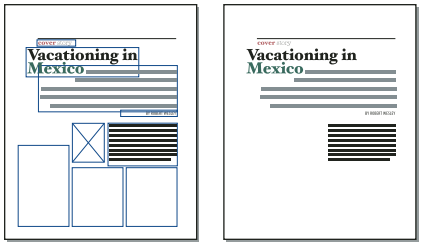
Empty frames Are *placeholders*. You can distinguish empty text frames from empty graphics frames by their appearance. An empty box represents an empty text frame; a box with an X across it indicates an empty graphics frame. You can add text to an empty text frame only if the frame is associated with the story exported to InCopy from InDesign. You can also import or paste graphics into an empty graphics frame in InCopy.



Empty text frame (left) and empty graphics frame (right)

Show or hide frame edges

Hiding frame edges also hides the X in an empty graphics frame.



Text and graphics frames with frame edges displayed (left) and hidden (right)

❖ In Layout view, choose View > Show Frame Edges or View > Hide Frame Edges.

View documents

Use the Zoom tool or View options to zoom in on or out of documents.

Zoom in or out

In Layout view, you can magnify or reduce the view of a page. The lower left corner of the document window displays the zoom percentage.

❖ Do any of the following:

- To magnify a specific area, select the Zoom tool and click the area you want to magnify. Each click magnifies the view to the next preset percentage, centering the display around the point you click. At maximum magnification, the center of the Zoom tool appears blank. To zoom out, hold down Alt (Windows) or Option (Mac OS) to activate the Zoom Out tool , and click the area you want to reduce. Each click reduces the view to the previous preset percentage.
- To magnify the view to the next preset percentage, activate the window you want to view, and choose View > Zoom In. Choose View > Zoom Out to reduce the view to the previous preset percentage.
- To set a specific magnification level, type or choose a magnification level in the Zoom box in the application bar.
- While pressing Alt (Windows) or Option (Mac OS), use the mouse scroll wheel or sensor to zoom in or out.

Use power zoom

Power zoom offers a quick way to scroll through your document pages. Using the grabber hand, you can use zoom in or out and scroll through your entire document. This feature is especially useful for long documents.

You must be in Layout view to use power zoom.

1 Click the Hand tool .

To activate the grabber hand, you can also hold down the spacebar or hold down Alt/Option while in text mode.

2 With the grabber hand active, click and hold down the mouse button.

The document zooms out so that you can see more of the spread. A red box indicates the view area.

3 With the mouse button still held down, drag the red box to scroll through the document pages. Press arrow keys or use the mouse scroll wheel to change the size of the red box.

4 Release the mouse button to zoom in on the new area of the document.

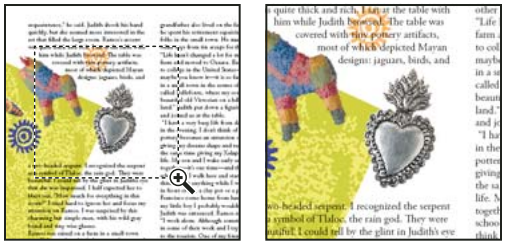
The document window returns to its original zoom percentage or to the size of the red box.

Magnify by dragging

1 Select the Zoom tool 🔍.

2 Drag to select the area you want to magnify.

To activate the Zoom In tool while using another tool, press Ctrl+spacebar (Windows) or Command+spacebar (Mac OS). To activate the Zoom Out tool while using another tool, press Ctrl+Alt+spacebar (Windows) or Command+Option+spacebar (Mac OS).



Zooming in on selection of text

Display the document at 100%

❖ Do any of the following:

- Double-click the Zoom tool 🔍.
- Choose View > Actual Size.
- Type or choose a magnification level of 100% in the Zoom box in the application bar.

Fit the page, spread, or pasteboard within the active window

❖ Do any of the following:

- Choose View > Fit Page In Window.
- Choose View > Fit Spread In Window.
- Choose View > Entire Pasteboard.

Customizing preferences and defaults

About preferences

Preferences include settings such as panel positions, measurement options, and display options for graphics and typography.

The difference between preferences and defaults is the area to which each applies. Preference settings specify the initial appearance and behavior of certain InCopy features. Default settings apply to InCopy documents.

Note: *InCopy preference settings are fully scriptable. To share a consistent set of preferences across user groups, develop a script to set the preferences, and then have all users in the group run the script on their computers. Don't copy and paste one user's preferences files onto another computer, as doing so might cause application instability. For more information about scripting, see the InCopy Scripting Guide on the application DVD.*

Set defaults

If you change settings when no documents are open, your changes set the defaults for new documents. If a document is open when you change settings, the changes affect only that document.

Similarly, if you change settings when no objects are selected, your changes set the defaults for new objects.

Change default settings for new documents

1 Close all documents.

2 Change any menu items or panel or dialog box settings.

If you use the same page size and language for most of your documents, you can change these defaults with no document open. For example, to change the default page size, close all documents, choose File > Document Setup, and select a desired page size. To set a default dictionary, close all documents, choose Edit > Preferences > Dictionary (Windows) or InCopy > Preferences > Dictionary (Mac OS), and select an option from the Language menu.

Specify default settings for new objects in a document

1 With document open, choose Edit > Deselect All.

2 Change any menu items or panel or dialog box settings.

Restore all preferences and default settings

❖ Do one of the following:

- (Windows) Start InCopy, and then press Shift+Ctrl+Alt. Click Yes when asked if you want to delete the preference files.
- (Mac OS) While pressing Shift+Option+Command+Control, start InCopy. Click Yes when asked if you want to delete the preference files.

Reset warning dialog boxes

1 Choose Edit > Preferences > General (Windows) or InCopy > Preferences > General (Mac OS).

2 Click Reset All Warning Dialogs to display all warnings, even the ones you've already dismissed. (As warnings appear, you can select an option to indicate you do not want to see the warning again.)

See also

"Adding text" on page 90

Moving through documents

Scrolling through documents

You can use the scroll bars (along the bottom and right sides of the InCopy window) or scroll with a mouse wheel or sensor in any view.

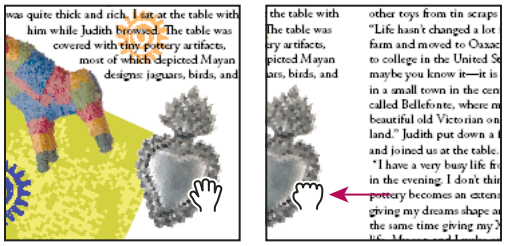
You can also use the Page Up, Page Down, and arrow keys on the keyboard to move through a story. In Layout view, pressing Page Up or Page Down shifts to the next or previous page in the layout. In Galley or Story view, Page Up and Page Down shift the view by one screen; the view doesn't necessarily go to the next page break. The Up Arrow and Down Arrow keys move the insertion point within the copy and scroll the view as necessary so that you can always see the insertion point.

In Layout view only, you can also use the Hand tool to move the document view in any direction.

Move through a document with the Hand tool

Some options for moving around within a story depend on whether you're working in Galley, Story, or Layout view. In Galley and Story view, you must use the scroll bars to see text that doesn't fit in the view. In Layout view, you can also use the Hand tool, page buttons, and commands.

❖ In Layout view, select the Hand tool , and then drag the document to move it.



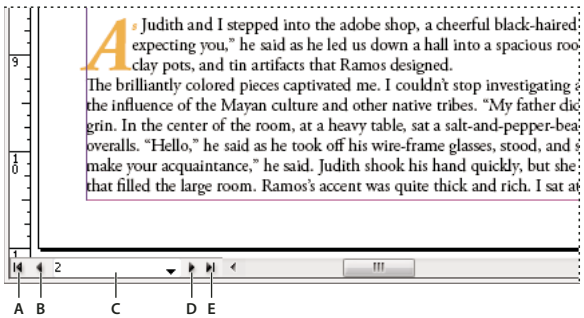
Dragging to view another part of page

To use power zoom when the Hand tool is selected, hold down the mouse button. This technique offers a quick way to scroll through multiple document pages.

Go to another page in Layout view

❖ Do one of the following:

- Click the buttons in the status bar, as shown in the following illustration:



Status bar in Layout view
***A.** First-spread button **B.** Previous-spread button **C.** Page number display box **D.** Next-spread button **E.** Last-spread button*

- Choose the page number from the pop-up menu on the status bar.

See also

"Keys for navigating through documents" on page 277

Jump to position markers

You can set a marker at a specific location in the text so that you can easily return to it using a command or shortcut. A position marker is useful if you change your place in the document to do another action, for example, to verify a fact in another area of text. A document can have only one position marker per session; inserting a marker deletes a previously placed marker. Closing a document also deletes a marker.

❖ Choose Edit > Position Marker, and do any of the following:

- To add a marker, place the insertion point in the text and then select Insert Marker.
- To replace an existing marker, select Replace Marker.
- To delete a marker, select Remove Marker.
- To return to a marker, select Go To Marker.

See also

"Keys for navigating through documents" on page 277

Reorder InCopy stories

When you open an assignments file or an InDesign document, you can change the order of the stories in Galley or Story view. Reordering stories doesn't affect their layout position.

1 Make sure that you are in Galley or Story view.

2 Drag the story's title to a new location.

Recovery and undo

Recover documents

InCopy guards your data against unexpected power or system failures using an automatic recovery feature. Automatically recovered data exists in a temporary file that is separate from the original document file on disk. Under normal circumstances you don't need to think about automatically recovered data, because any document updates stored in the automatic recovery file are automatically added to the original document file when you choose the Save or Save As command or exit from InCopy normally. Automatically recovered data is important only if you're unable to save successfully before an unexpected power or system failure.

Even though these features exist, you should save your files often and create backup files in case of unexpected power or system failures.

See also

"Adobe Version Cue" on page 38

Find recovered documents

1 Restart your computer.

2 Start InCopy .

If automatically recovered data exists, InCopy automatically displays the recovered document. The word [Recovered] appears after the filename in the title bar of the document window to indicate that the document contains unsaved changes that were automatically recovered.

Note: *If InCopy fails after attempting to open a document using automatically recovered changes, the automatically recovered data may be corrupted.*

3 Do one of the following:

- For Adobe InCopy® files linked to an InDesign publication, choose File > Save.
- For stand-alone InCopy files, choose File > Save As, specify a location and a new filename, and click Save. The Save As command creates a new file that includes the automatically recovered data.
- To discard any automatically recovered changes and use the last saved version of the file, choose File > Revert Content.

Change the location of recovered documents

1 Choose Edit > Preferences > File Handling (Windows) or InCopy > Preferences > File Handling (Mac OS).

2 Under Document Recovery Data, click Browse (Windows) or Choose (Mac OS).

3 Specify the new location for the recovered document, click Select (Windows) or Choose (Mac OS), and then click OK.

Undo mistakes

If necessary, you can cancel a lengthy operation before it's completed, undo recent changes, or revert to a previously saved version. You can undo or redo up to several hundred of the most recent actions (the amount is limited by the amount of RAM available and the kinds of actions you performed). The series of actions is discarded when you choose the Save As command, close a document, or when you exit from the program.

❖ Do one of the following:

- To undo the most recent change, choose Edit > Undo *[action]*. (You cannot undo certain actions, such as scrolling.)
- To redo an action, choose Edit > Redo *[action]*.
- To undo all changes made since the last time you saved the project, choose File > Revert (InDesign) or File > Revert Content (InCopy).
- To close a dialog box without applying changes, click Cancel.

Working with ConnectNow

Working with ConnectNow

Adobe® ConnectNow provides you with a secure, personal online meeting room where you can meet and collaborate with others via the web in real time. With ConnectNow, you can share and annotate your computer screen, send chat messages, and communicate using integrated audio. You can also broadcast live video, share files, capture meeting notes, and control an attendee's computer.

You can access ConnectNow directly from the application interface.

1 Choose File > Share My Screen.

2 In the Share My Screen dialog box, enter your Adobe ID and password, and click Sign In. If you don't have an Adobe ID and password, click the Create a Free Adobe ID link at the top of the dialog box.

3 To share your screen, click the Share My Computer Screen button at the center of the ConnectNow application window.

For complete instructions on using ConnectNow, see http://help.adobe.com/en_US/Acrobat.com/ConnectNow/index.html.

For a video tutorial about using ConnectNow, see Using ConnectNow to share your screen (7:12). (This demonstration is in Dreamweaver.)

Chapter 3: Working with InCopy documents

In Adobe® InCopy®, you can create stand-alone documents, or you can work with documents that are linked to Adobe® InDesign®. When you work with linked documents, you can have more than one InCopy story in an InDesign file, depending on your workflow system. Writers, editors, and designers can work simultaneously on the same InDesign document, without overwriting each other's work.

Using an InCopy workflow

About InCopy workflows

Tight integration between InCopy and InDesign enables a workflow that lets writers, editors, and designers work simultaneously on the same InDesign document, without overwriting each other's work. The workflow system allows users to check files out and in, thereby preserving file integrity.

InCopy users can view their content contributions within the context of layouts without installing InDesign. Using InCopy, writers and editors can take full control of text, including typesetting functions such as applying formatting styles (usually imported from InDesign), copyfitting, adjusting line and page breaks, setting hyphenation, kerning, and so on. InCopy users can import graphics to enhance their stories, and make limited transformations on those graphics, such as scaling and cropping. After the content is saved in InCopy, the document can be updated in InDesign. In addition, InDesign users can share design updates with InCopy users, ensuring they are working with the latest layouts.

Typically, a system integrator customizes the interaction between InCopy and InDesign, setting up and defining the workflow system for the group. The workflow system controls file creation, synchronization (with the master server), and viewing. InCopy and InDesign work with several different workflow systems, including the built-in system enabled by the InCopy® LiveEdit Workflow plug-ins for small workgroups. For specific details about your workflow system, talk to the system integrator.

About linked (managed) documents

A *linked* InCopy document is a content file (either text or graphics) that is placed in an open InDesign document or assignment file. The content is associated with an InDesign layout, and therefore *managed* by the InDesign document. The InDesign user makes this connection from within InDesign; you cannot create or manage the link from InCopy. The InDesign connection can be made before the InCopy user starts writing and editing text, while the writing is in progress, or after the text work is finished. Once the content is linked, the InCopy user can see (but not change) the page layouts, styles, and so on, as they appear in the InDesign document.

Linked documents have the following additional characteristics:

- With a linked InCopy file, you can do just about anything that concerns the text itself. For example, you can specify text-formatting options, change fonts, and carry out other editing and copyfitting functions within the design and formatting limits of the InDesign layout and your workflow system. You cannot, however, change the text or graphics frames, column layout, threading sequence, or any other design elements; these are set up in InDesign.

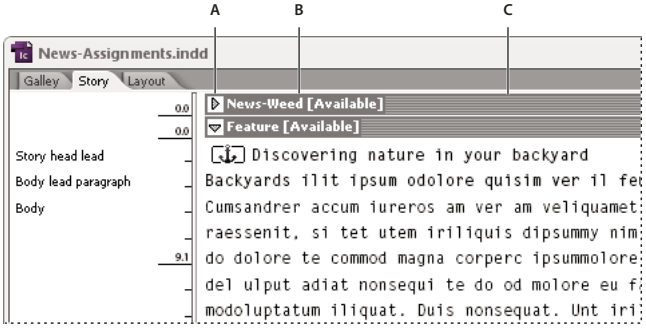
- Linked content is managed by your workflow system, where it is locked for access control. Your system might offer several options for opening a linked story, such as checking out each InCopy file so that you alone can work on it. For instructions, see your workflow system documentation or ask your system administrator, or check out content using InCopy if your workflow uses the InCopy LiveEdit Workflow plug-ins.

Working with multistory files

When you work with linked documents, you can have more than one InCopy story in an InDesign file, depending on your workflow system. A file with multiple stories must be created in InDesign as either an assignment file or an InDesign file with linked InCopy content. You cannot use InCopy to create a multistory document. See your workflow system documentation for details.

Multiple stories are shown and separated in Galley and Story views with a *story separator bar*. The story separator bar provides easy access to each story created within an InDesign document.

The story separator bar contains the story title and an expand and collapse button which enables you to show or hide each story. When a story is collapsed, the text is hidden and the story separator bar remains visible within the edit pane.



The story separator bar
A. *Expand and collapse button* ***B.*** *Story name* ***C.*** *Story separator bar*

Stand-alone documents

Work with stand-alone documents

An InCopy document that is not associated with an InDesign document is called a *stand-alone document*. You can set up and modify the text area, page size, and orientation for stand-alone documents. However, if the story is later linked to an InDesign document, the InDesign settings override the settings used in InCopy.

Note: *You can also click Save Preset to save document settings for future use. When creating a new document, you can simply choose it from the Document Preset menu and click OK without having to change any settings. If you're working in an editorial workgroup, these saved presets can be shared with other members of your team. (See "Define custom document presets" on page 35.)*

Create a stand-alone document

1 Choose File > New.

2 To create a document that does not have facing pages in each spread, deselect Facing Pages.

3 Under Text Area, type values for Width and Depth. Text dimensions provide accurate line break information without relying on InDesign for copyfit information.

4 Choose a page size from the list, or type values for Width and Height. Page size represents the final size you want after bleeds or other marks outside the page are trimmed.

5 Click OK.

Open a stand-alone document

You can open an InCopy content file (.icml) that has been created in InCopy or exported from InDesign. When opened in InCopy, these InCopy content files will not show the page geometry from the InDesign layout. You can also open documents from previous versions of InCopy, and you can open InCopy template files (.inct).

You can also open Microsoft® Word and text files directly in InCopy, and then save them as Text Only (.TXT) or Rich Text Format (.RTF).

1 Choose File > Open.

2 Select the document, and then click Open.

You can also choose File > Open Recent, and select one of the documents you saved recently. To specify how many recent documents are displayed, choose Edit > Preferences > File Handling (Windows), or InCopy > Preferences > File Handling, and then specify a number for Number Of Recent Items To Display.

See also

"Save documents" on page 36

"Place (import) text" on page 91

Change document layout

1 In any view of a stand-alone document, choose File > Document Setup.

2 Select basic layout options in the dialog box that appears.

3 Click OK.

Define custom document presets

You can create custom document settings and then share them with others in your workgroup to save time and ensure consistency when creating similar documents.

1 Choose File > Document Presets > Define.

2 Do one of the following:

- To create a new preset, click New and specify a name for the preset.
- To base a preset on an existing one, select a preset from the list and click Edit.
- To use a different set of settings, click Load, open a document settings file (.icst), and then click Edit.

3 Select basic layout options in the dialog box that appears. (See "Work with stand-alone documents" on page 34 for a description of each option.)

4 Click OK twice.

You can save a document preset to a separate file and distribute it to other users. To save and load document preset files, use the Save and Load buttons in the Document Presets dialog box.

Linking InCopy files to InDesign

When a stand-alone InCopy story is linked to an InDesign document, the InDesign formatting overrides the InCopy layout and design settings.

The link between InCopy files and InDesign layouts can be made a number of ways in InDesign, usually by placing an InCopy (.icml) file into an InDesign layout.

About Adobe Bridge

Adobe Bridge is a cross-platform application included with Adobe Creative Suite components that helps you locate, organize, and browse the assets you need to create print, web, video, and audio content. You can start Adobe Bridge from any Creative Suite component (except Adobe Acrobat® 9), and use it to access both Adobe and non-Adobe asset types.

From Adobe Bridge, you can:

- Manage image, footage, and audio files: Preview, search, sort, and process files in Adobe Bridge without opening individual applications. You can also edit metadata for files, and use Adobe Bridge to place files into your documents, projects, or compositions.
- Perform automated tasks, such as batch commands.
- Synchronize color settings across color-managed Creative Suite components.
- Start a real-time web conference to share your desktop and review documents.

For a video overview on using Adobe Bridge, see www.adobe.com/go/lrvid4011_bri.

See also

Adobe Bridge overview video

Browse for files by using Adobe Bridge

Adobe Bridge lets you efficiently organize, browse, and locate the assets you need to create content for print, the web, and mobile devices.

❖ To open the Adobe Bridge Browser, choose File > Browse In Bridge or click the Adobe Bridge icon Br in the application bar.

Scripting in InCopy

Scripting is a great tool for performing a variety of tasks. A script can be as simple as an automated common task or as complex as an entire new feature. You can create your own scripts, and you can run scripts that other people have created. Use the Scripts panel (Window > Scripts) to run scripts within InCopy.

For more information about scripting, see the InCopy Scripting Guide on the application DVD or on the Adobe website.

Saving and exporting

Save documents

❖ Do one of the following:

- To save an existing document under the same name, choose File > Save Content.
- To save a document under a new name, choose File > Save Content As, specify a location and filename, and click Save. The newly named document becomes the active document.

- To save a copy of a story or graphic under a new document name, choose File > Save Content Copy, specify a location and filename, and click Save. The saved copy does not become the active document.
- To save a copy of a document as a template, choose File > Save Content As, specify a location and filename, and then choose InCopy Template from Save As Type (Windows) or Format (Mac OS).
- To save a copy of a document in a format compatible with InCopy CS3, choose File > Save Content As, specify a location and filename, and then choose InCopy CS3 Interchange from Save As Type (Windows) or Format (Mac OS).
- To save a copy of a document in a text format, choose File > Save Content As, specify a location and filename, and then choose Text Only or Rich Text Format from Save As Type (Windows) or Format (Mac OS).

Note: *Saving a managed (linked) document does not update the link in the InDesign file. To update the story on the file system, follow the process described in your workflow system documentation or ask your system administrator for information.*

InCopy file types

You can work with several different file types in InCopy.

InCopy content files (.icml) This is the default file type when exporting stories or graphics from InDesign, and when saving or creating new documents using InCopy. This file type appears as InCopy Document in the Export or Save As dialog box.

InCopy CS3 Interchange files (.incx) This is the file type when saving or exporting stories that can be opened using InCopy CS3.

Assignment files (.icma) These files are a subset of an InDesign document. They display content and styles, as well as page geometry from the parent InDesign file. Assignment files can display different levels of visual fidelity (wireframe, assigned spreads, or all spreads). The InDesign user sets these options while creating the assignment file. Only InDesign users can *create* assignment files; only InCopy users can *open* assignment files.

If you create CS3-compatible assignment files, the .inca extension is used.

Assignment package files (.icap) These files are assignment files that have been compressed in InDesign for distribution. Assignment packages include the assignment file, the assigned story files, and any linked images.

If you create a package with a CS3-compatible assignment, the .incp extension is used.

Template files (.icmt) Templates are useful starting points for stand-alone documents, because you can preset them with page size dimensions, text area dimensions, styles (paragraph and character), XML tags, swatches, pretagged sample content, and so on. Template files open as “Untitled” documents and display content and styles, but no page geometry (layout information from an InDesign document). This file type appears as InCopy Template in the Save As dialog box.

InDesign files (.indd) When viewed in InCopy, these files provide full fidelity with the InDesign document, including content, styles, and layout of all page items. InCopy users can edit only those content items made available to them by InDesign users. Other items can be viewed but not edited.

You can open several different types of text files, including Microsoft Word, RTF, and TXT files, directly in InCopy. When you do so, the import options for that file type appear.

Export InCopy documents

You can save all or part of an InCopy document in a different file format. In most cases, each component (for example, text frames and graphics) in an InCopy document is exported to a separate file. The exception is exporting an InCopy document to Adobe PDF, which copies all of the text and graphics in a document to a single PDF file.

1 Do one of the following:

- To export text, click in the text with the Type tool T.
- To export a graphic, click the graphic with the Position tool.

2 Choose File > Export.

3 Specify a name and location for the exported content, and then select a format under Save As Type.

The XML format appears in the list only if XML tags have been added to the document. If you are exporting text and don't see a listing for your word-processing application, you might need to export the text in a format that the application can import, such as Rich Text Format. If your word-processing application doesn't support any of the InCopy export formats, use the Text Only (ASCII) format.

Note: *Exporting in ASCII format removes all character attributes from the text. To retain all formatting, use the InCopy Tagged Text export filter.*

4 Click Save to export the content in the format you've selected.

See also

"Place (import) text" on page 91

"InCopy file types" on page 37

Rename InCopy stories

When a story is exported from InDesign, it is given a document filename with a .icml extension (or .incx for CS3 compatible stories). InCopy automatically uses this filename as the story name that appears in the Assignments panel and story separator bar. Unlike the *filename*, the *story name* is embedded in the file.

1 To change a story name manually, open a story file in InCopy.

2 Choose File > Content File Info.

3 Make sure that the Description tab is selected, and then type a new name for Document Title.

Note: *Depending on the workflow processes of your system, an administrator might have to change the story name for you. If you are unable to rename the story by following the steps above, talk to your workflow administrator.*

You can also change the story name in the Assignments panel when the story is checked out. However, the filename is not changed on disk.

Adobe Version Cue

Adobe Version Cue® CS4 is an asset management system that lets designers work collaboratively on a set of common files without having to change their workflow significantly. Designers can easily track and manipulate multiple versions of files.

Version Cue handles the following tasks:

- Creating versions of your files
- Enabling workgroup collaboration (file sharing, version control, the ability to check files in and out)

- Organizing files into private or shared projects
- Providing thumbnails so you can browse and view files
- Organizing data so you can view and search on file information, version comments, and file status
- Creating and managing user access, projects, and PDF reviews by way of Version Cue Server Administration

Version Cue consists of two pieces: the Adobe Version Cue Server and Adobe Drive.

Adobe Version Cue Server The Version Cue Server can be installed locally or on a dedicated computer. It hosts Version Cue projects and PDF reviews.

Adobe Drive Adobe Drive connects to Version Cue CS4 servers. The connected server appears like a hard drive or mapped network drive in Windows Explorer, Mac OS Finder, and dialog boxes such as Open and Save As.

Note: *The "Use Adobe Dialog" option that appears in CS3 applications does not appear in CS4 applications. This option is no longer necessary. Connecting to the Version Cue Server using Adobe Drive lets you view project files from any application.*

Version Cue is included with Adobe Creative Suite 4 Design Premium and Standard, Adobe Creative Suite 4 Web Premium and Standard, Adobe Creative Suite 4 Production Premium, and Adobe Creative Suite 4 Master Collection.

Version Cue enables versioning and asset management in all applications, but it includes enhanced features for the following products: Adobe Flash®, Adobe Illustrator®, Adobe InDesign®, Adobe InCopy®, Adobe Photoshop®, and Adobe Bridge. When you use any of these applications to open a file stored on a Version Cue server, the file is checked out automatically. For all other applications, use the context menu to check in and check out files manually.

For a video on Version Cue, see www.adobe.com/go/lrvid4038_vc. For Version Cue Help, see www.adobe.com/go/learn_vc_versioncuehelp_cs4.

See also

Version Cue Help

Version Cue video

Frames, grids, rulers, and guides

About frames in InCopy files

As in Adobe InDesign, all InCopy text and graphics appear inside frames. For linked documents, InDesign controls the frame placement and design for a publication. You can see the frame structure of the InDesign document in InCopy Layout view.

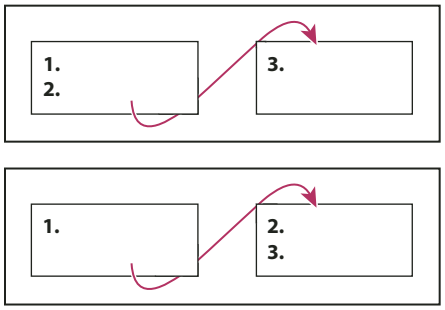
Modifying frames

You (or someone on your team) must make any changes to frames from within the InDesign document, unless the frames are for inline graphics. You can move, scale, rotate, or shear inline graphics frames, but not other frames. For more information, see your workflow documentation.

Threading text

A long story can flow from one frame to other frames that are connected in sequence, or *threaded.* A threaded story begins on a particular column of a page and can continue on any other columns and pages of the publication. The InDesign user always sets up the threading sequence for an InCopy story.

When you add text to a threaded story, the story flows through each successive frame until all of the assigned frames are full.



Flow of threaded text: Original text in threaded frames (top); after you add text to first frame, text reflows to second frame (bottom)

If the text doesn't fit in its allotted frame space, the hidden part of the story is called *overset text*.

See also

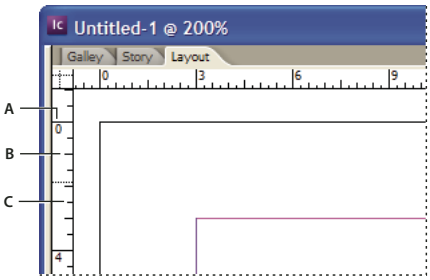
"About frames" on page 25

"Copyfitting text" on page 155

Change measurement units and rulers

InCopy includes a vertical depth ruler for copyfitting text in Galley and Story views, as well as horizontal and vertical rulers in Layout view for measuring layouts. By default, rulers begin measuring from the upper-left corner of a page or spread. You can change this by moving the zero point.

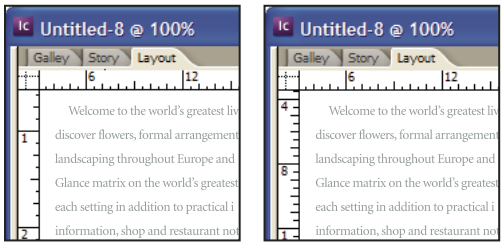
You can work with several standard measurement units, change these settings at any time, and temporarily override the current measurement units as you enter a value. Changing the measurement units doesn't move guides, grids, and objects, so when ruler tick marks change, they might not line up with objects aligned to the old tick marks.



Rulers
A. *Labeled tick marks* ***B.*** *Major tick marks* ***C.*** *Minor tick marks*

You can set up different measurement systems for horizontal and vertical rulers. For example, many newspapers measure horizontal layouts in picas and vertical text stories in inches. The system you select for the horizontal ruler governs tabs, margins, indents, and other measurements. Each spread has its own vertical ruler; however, all vertical rulers use the same settings you specify in the Units & Increments section of the Preferences dialog box.

The default unit of measure for the rulers is picas (a pica equals 12 points). You can change the ruler units and control where the major tick marks appear on a ruler. For example, if you change the ruler unit for the vertical ruler to 12 points, a major ruler increment appears every 12 points (if such a display is possible in the current magnification). The tick mark labels include your customized major tick marks, so when the ruler reads 3 in the same example, it marks the third instance of the 12-point increment, or 36 points.



Vertical ruler using inches (left), and custom 12-point increments (right)

Setting custom ruler increments in the vertical ruler is useful for lining up a ruler's major tick marks with a baseline grid.

Specify the measurement units

You can set custom measurement units for the on-screen rulers and for use in panels and dialog boxes. You can also change these settings at any time and temporarily override the current measurement units as you enter a value.

1 Choose Edit > Preferences > Units & Increments (Windows) or InCopy > Preferences > Units & Increments (Mac OS).

2 For Horizontal and Vertical, choose the measurement system you want to use for horizontal and vertical dimensions in rulers, dialog boxes, and panels; choose Custom, and type the number of points at which you want the ruler to display major tick marks. Click OK.

You can also change ruler units by right-clicking (Windows) or Control-clicking (Mac OS) a ruler, and choosing the units from the context menu.

Override default measurement units

You can specify a unit of measurement that is different from the default.

❖ Highlight the existing value in a panel or dialog box, and type the new value using the notation in the following table:

To specify:	Type these letters after the value:	Examples	Result
Inches	i in inch "	5.25i 5.25in 5.25inch 5.25″	5 1/4 inches
Millimeters	mm	48mm	48 millimeters
Centimeters	cm	12cm	12 centimeters
Picas	p	3p	3 picas
Points	pt p (before value)	6pt p6	6 points

To specify:	Type these letters after the value:	Examples	Result
Picas and points	p (between values)	3p6	3 picas, 6 points
Ciceros	c	5c	5 ciceros
Agates	ag	5ag	agates

Change the zero point

The *zero point* is the position at which the zeros on the horizontal and vertical rulers intersect. By default, the zero point is at the top left corner of the first page of each spread. This means that the default position of the zero point is always the same relative to a spread, but may seem to vary relative to the pasteboard.

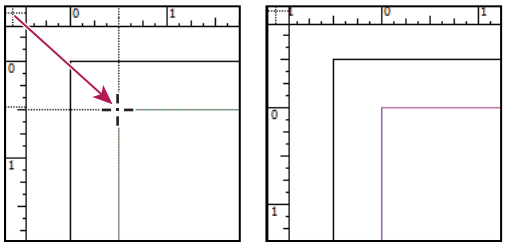
The X and Y position coordinates in the Control panel, Info panel, and Transform panel are displayed relative to the zero point. You can move the zero point to measure distances, to create a new reference point for measurement, or to tile oversized pages. By default, each spread has one zero point at the upper left corner of the first page, but you can also locate it at the binding spine, or specify that each page in a spread has its own zero point.

Adjust the zero point

When you move the zero point, it moves to the same relative location in all spreads. For example, if you move the zero point to the top left corner of the second page of a page spread, it will appear in that position on the second page of all other spreads in the document.

❖ Do one of the following:

- To move the zero point, drag from the intersection of the horizontal and vertical rulers to the position on the layout where you want to set the zero point.



Establishing a new zero point

- To reset the zero point, double-click the intersection of the horizontal and vertical rulers .
- To lock or unlock the zero point, right-click (Windows) or Control-click (Mac OS) the zero point of the rulers, and choose Lock Zero Point or Unlock Zero Point in the context menu.

Change the default zero point

Using the Origin setting in the Preferences dialog box, you can set the default zero point for rulers as well as the scope of the horizontal ruler. The *scope* determines whether the ruler measures across the page, across the entire spread, or, for multipage spreads, from the center of the spine.

If you set the ruler origin at each spread's binding spine, the origin becomes locked at the spine. You won't be able to reposition the ruler origin by dragging it from the intersection of the rulers unless you choose another origin option.

1 Choose Edit > Preferences > Units & Increments (Windows) or InCopy > Preferences > Units & Increments (Mac OS).

2 In the Ruler Units section, in the Origin menu, do one of the following:

- To set the ruler origin at the top-left corner of each spread, choose Spread. The horizontal ruler measures across the entire spread.
- To set the ruler origin at the top-left corner of each page, choose Page. The horizontal ruler starts at zero for each page in a spread.
- To set the ruler origin at the center of the spine, choose Spine. The horizontal ruler measures in negative numbers to the left of the spine and positive numbers to the right of the spine.

You can also change horizontal ruler origin settings using the context menu that appears when you right-click (Windows) or Control-click (Mac OS) the horizontal ruler.

Use grids

In Layout view, you can view (or hide) a framework of grids and guides to show the position and alignment of objects. In most work systems, a designer working with InDesign sets up the grids and guides for the publication. InCopy users can see these layout aids after an InCopy story is linked to the InDesign document.

You can create grids within InCopy. But, because InDesign grids override InCopy settings when files are linked, this feature is more useful for stand-alone documents that you publish directly from InCopy.

These grids and guides are never visible on printed or exported output. One set of rulers and grids exists per page, but a guide can exist across all pages of a spread or within only a single page.

Note: *Grids, rulers, and guides are not available in Galley or Story view.*

Set up a baseline grid

Use Grid Preferences to set up a baseline grid for the entire document.

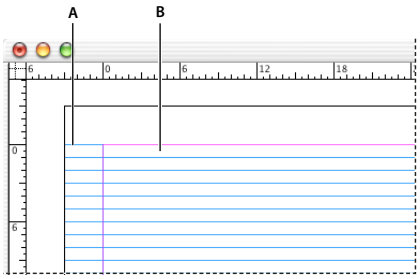
1 Choose Edit > Preferences > Grids (Windows) or InCopy > Preferences > Grids (Mac OS).

2 Specify a baseline grid color by choosing a color in the Color menu. You can also choose Custom in the Color menu.

3 For Relative To, specify whether you want the grid to start at the top of the page or the top margin.

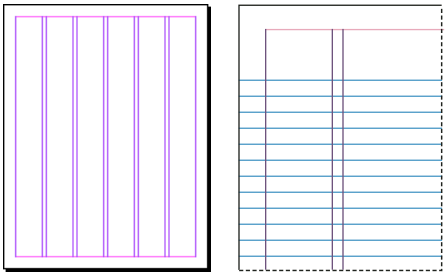
4 For Start, type a value to offset the grid from either the top of the page or the top margin of the page, depending on the option you choose from the Relative To menu. If you have trouble aligning the vertical ruler to this grid, try starting with a value of zero.

5 For Increment Every, type a value for the spacing between grid lines. In most cases, type a value that equals your body text leading, so that lines of text align perfectly to this grid.



Baseline grid in document window
A. *First grid line* ***B.*** *Increment between grid lines*

6 For View Threshold, type a value to specify the magnification below which the grid does not appear. Increase the view threshold to prevent crowded grid lines at lower magnifications.



Baseline grid at magnification below view threshold (left) and above view threshold (right)

7 Click OK.

Set up a document grid

1 Choose Edit > Preferences > Grids (Windows) or InCopy > Preferences > Grids (Mac OS).

2 Specify a document grid color by choosing a color in the Color menu. You can also choose Custom in the Color menu.

3 Do one of the following, and click OK:

- To put the document and baseline grids behind all other objects, make sure that Grids In Back is selected.
- To put the document and baseline grids in front of all other objects, deselect Grids In Back.

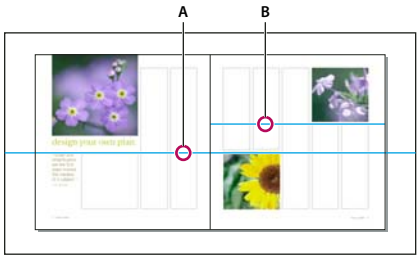
To put guides behind all other objects, you can also choose Guides In Back in the context menu that appears when you right-click (Windows) or Control-click (Mac OS) an empty area of the document window.

Show or hide grids

- To show or hide the baseline grid, choose View > Grids & Guides > Show/Hide Baseline Grid.
- To show or hide the document grid, choose View > Grids & Guides > Show/Hide Document Grid.

View ruler guides

Ruler guides are different from grids in that they can be positioned freely on a page or on a pasteboard. InDesign users can create two kinds of ruler guides: *pageguides*, which appear only on the page on which they create them, or *spreadguides*, which span all pages and the pasteboard of a multiple-page spread. You can view ruler guides if they exist in the InDesign document or assignment file, but you cannot create them in InCopy.



Guides
A. *Spread guide* ***B.*** *Page guide*

Show or hide ruler guides

1 Make sure that you are in Layout view; if necessary, click the Layout view tab at the top of the edit pane.

2 Choose View > Grids & Guides > Show/Hide Guides.

Display ruler guides behind objects

By default, ruler guides appear in front of all other guides and objects. However, some ruler guides may block your view of objects, such as lines with narrow stroke widths.

You can change the Guides In Back preference to display ruler guides in front of or behind all other objects. However, regardless of the Guides In Back setting, objects and ruler guides are always in front of margin and column guides.

1 Choose Edit > Preferences > Guides & Pasteboard (Windows) or InCopy > Preferences > Guides & Pasteboard (Mac OS).

2 Select Guides In Back, and click OK.

Customize the pasteboard and guides

1 In the Edit menu (Windows) or InCopy menu (Mac OS), choose Preferences > Guides & Pasteboard.

2 To change the color of margin or column guides, choose a preset color from a menu, or choose Custom and specify a color using the color picker.

3 To make the pasteboard bigger or smaller, enter a value for Minimum Vertical Offset.

4 Click OK.

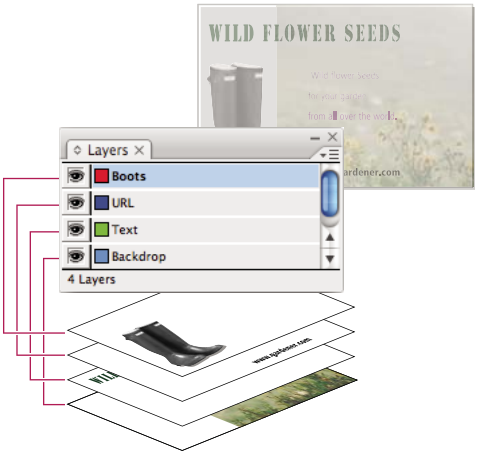
Use layers

Layers are like transparent sheets stacked on top of each other. If a layer doesn't have objects on it, you can see through it to any objects on layers behind it.

Only InDesign users can create layers. InCopy users can show or hide layers and change layers settings. If the InDesign user created multiple layers in the document, you can hide layers in InCopy, letting you edit specific areas or kinds of content in the document without affecting other areas or kinds of content. For example, if your document prints slowly because it contains many large graphics, you can hide all non-text layers and quickly print the text layer for proofreading.

Additional layer notes:

- Objects on masters appear at the bottom of each layer. Master objects can appear in front of document page objects if the master page objects are on a higher layer.
- Layers involve all pages of a document, including masters. For example, if you hide Layer 1 while editing page 1 of your document, the layer is hidden on all pages until you decide to show it again.



The Layers panel lists layers, with the frontmost layer appearing at the top of the panel.

Show and hide layers

1 Choose Window > Layers.

2 In the Layers panel, do one of the following:

- To hide a specific layer, click the eye icon to the left of the layer name.
- To show a specific layer, click the space to the left of the layer name.
- To show or hide all layers at once, choose Show/Hide All Layers from the panel menu.

Note: *Only visible layers print.*

Importing graphics

Import graphics

InCopy allows you to import graphics into existing frames. This is especially useful where content is created before the layout, because you can choose the graphics for your articles as you write.

You can import graphics into existing frames only. Only InDesign users can create graphics frames. In standalone InCopy documents, you can insert a graphic into the default text frame, making it an inline graphic.

InCopy supports the same wide range of graphics file formats as InDesign, including graphics created using Adobe® Illustrator® 8.0 and later, bitmap formats such as PDF, PSD, TIFF, GIF, JPEG, and BMP, and vector formats such as EPS. You can even import InDesign (INDD) pages as images. Other supported formats include DCS, PICT, WMF, EMF, PCX, PNG, and Scitex CT (.SCT).

Notes on placing graphics in InCopy

When you import graphics into InCopy, keep the following in mind:

- For managed content, you must check out a frame before you can import a graphic into it.
- Once you import a graphic, you can transform (move, scale, rotate, shear) it inside the frame, fit the graphic to the frame, and control the graphic's appearance. You can also tag a selected frame for future XML use by selecting commands from the context menu.

- When InDesign users create a new frame, they specify whether it is a text, graphics, or unassigned frame. InCopy users cannot change this frame type within InCopy. Therefore, if you try to import a graphic into a text frame, for example, it may appear as a large inline graphic.
- You can select and modify the graphics but not the frames in InCopy, unless they are nested or inline frames. Only InDesign users can modify graphics frames.
- You can place, paste, or drag graphics into an anchored, floating, or inline graphics frame. You can import a graphic into a text frame only if that frame has an active insertion point or is an inline graphics frame.
- If you import a graphic into a nested frame, the graphic is imported into the deepest-level frame under the pointer. Nested frames that contain graphics, unlike top-level frames, can be selected with the Position tool. (See "Position tool overview" on page 59.)
- If an effect, such as transparency, drop shadow, or feathering, is applied to a frame in InDesign, it will be visible in an assignment file or InDesign (.indd) file open in InCopy. It will not be visible in a linked (.icml) file open in InCopy.

Place a graphic in an InCopy document

1 Do one of the following:

- To place a graphic in a standalone InCopy document, place the insertion point in the text frame.
- To place a graphic in a linked document, make sure the graphics frame is checked out to you. The Editing icon appears in the upper left corner of the frame.

2 Choose File > Place and select a graphics file.

3 To set format-specific import options, select Show Import Options to see format-specific settings, and then click Open.

Note: *When you place a graphic created in lllustrator 9.0 or later by using the Show Import Options dialog box, the options are identical to those for PDF files. When you place an Illustrator 8.x graphic, the options are identical to those for EPS files*

4 If another dialog box appears, select your import options, and click OK.

5 To import into a frame, click the loaded graphics icon in the frame. To place a specified page of a multipage PDF document, click the loaded graphics icon in a frame.

If you accidently replace an existing graphic with an image you're placing, press Ctrl+Z (Windows) or Command+Z (Mac OS) to return the original image to the frame and display the loaded graphics icon.

Drag a graphic into a frame

❖ Do one of the following:

- To place a graphic in an existing graphics frame, make sure the frame is checked out to you, and then drag the graphic file's icon from the file system to the frame.
- To place a graphic at an active text insertion point, drag the graphic file's icon to any place in the text frame. This method is available only in Layout view.

Paste a graphic into a frame

1 Make sure the graphics frame is checked out to you. The Editing icon appears in the upper left corner of the frame.

2 Cut or copy a graphic.

3 Hold the Hand tool over the graphics frame, right-click (Windows) or Control-click (Mac OS), and then choose Paste Into.

Create an inline graphic

1 Make sure the text frame is checked out to you. The Editing icon appears in the upper left corner of the frame.

2 Do one of the following:

- To place a graphic in an existing inline graphics frame, use the Place or Cut command to select a graphic. Click the loaded graphics icon in the frame.
- To place a graphic at an active text insertion point, drag the graphic file's icon to any place in the text frame, or use the Place command to import the graphic.

Import options for graphics

The options for importing graphics vary depending on the type of image being imported. To display import options, make sure that Show Import Options is selected in the Place dialog box.

Encapsulated PostScript (.eps) import options

When you place an EPS graphic (or a file saved with Illustrator 8.0 or earlier) and select Show Import Options in the Place dialog box, you'll see a dialog box containing these options:

Read Embedded OPI Image Links This option tells InCopy to read links from OPI comments for images included (or nested) in the graphic.

Deselect this option if you're using a proxy-based workflow and plan to have your service providers perform the image replacement using their OPI software. When this option is deselected, InDesign preserves the OPI links but does not read them. When you print or export, the proxy and the links are passed on to the output file.

Select this option if you're using a proxy-based workflow and you want InDesign, instead of your service provider, to perform image replacement when you output the final file. When you select this option, the OPI links appear in the Links panel.

Also select this option when you import EPS files containing OPI comments that are not part of a proxy-based workflow. For example, if you import an EPS file containing OPI comments for an omitted TIFF or bitmap image, you'll want to select this option so that InDesign can access the TIFF information when you output the file.

Apply Photoshop Clipping Path Regardless of whether this option is selected, a placed EPS file includes a clipping path in InDesign. However, deselecting this option may result in a different bounding box size.

Proxy Generation This creates a low-resolution bitmap representation of an image when drawing the file to the screen. The following settings control how the proxy will be generated:

- **Use TIFF Or PICT Preview** Some EPS images contain an embedded preview. Select this option to generate the proxy image of the existing preview. If a preview does not exist, the proxy will be generated by rasterizing the EPS to an offscreen bitmap.
- **Rasterize The PostScript** Select this option to ignore the embedded preview. This option is typically slower but provides the highest-quality results.

Note: *When you import more than one single file into the same document, all instances share the proxy setting of the first instance of the imported file.*

Bitmap import options

You can apply color-management options to individual imported graphics when using color-management tools with a document. You can also import a clipping path or an alpha channel saved with an image created in Photoshop. Doing so lets you directly select an image and modify its path without changing the graphics frame.

Note: *Although Adobe InCopy does not include color-management options, these import options are relevant when the images you place in InCopy are transferred to InDesign.*

When you place a PSD, TIFF, GIF, JPEG, or BMP file and select Show Import Options in the Place dialog box, you'll see a dialog box containing these options:

Apply Photoshop Clipping Path If this option isn't available, the image wasn't saved with a clipping path, or the file format doesn't support clipping paths. If the bitmap image doesn't have a clipping path, you can create one in InDesign.

Alpha channel Select an alpha channel to import the area of the image saved as an alpha channel in Photoshop. InCopy uses the alpha channel to create a transparent mask on the image. This option is available only for images that contain at least one alpha channel.

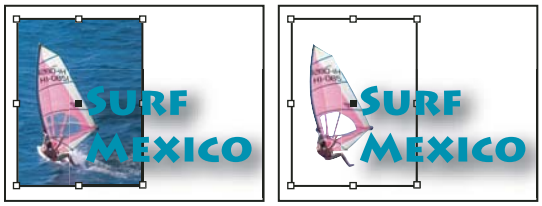


Image imported without clipping path (left) and with clipping path (right)

Click the Color tab to view the following options:

Profile If Use Document Default is selected, leave this option unchanged. Otherwise, choose a color source profile that matches the gamut of the device or software used to create the graphic. This profile enables InDesign to properly translate its color to the gamut of the output device.

Rendering Intent Choose a method for scaling the color range of the graphic to the color range of the output device. Typically, you'll choose Perceptual (Images) because it accurately represents colors in photographs. The Saturation (Graphics), Relative Colorimetric, and Absolute Colorimetric options are better for areas of solid color; they don't reproduce photographs well. Rendering Intent options aren't available for bitmap, grayscale, and index-color mode images.

Portable Network Graphics (.png) import options

When you place a PNG image and select Show Import Options in the Place dialog box, you'll see a dialog box with three sections of import settings. Two sections contain the same options available for other bitmap image formats. The other section, PNG Settings, contains the following settings:

Use Transparency Information This option is enabled by default when a PNG graphic includes transparency. If an imported PNG file contains transparency, the graphic interacts only where the background is transparent.

White Background If a PNG graphic does not contain a file-defined background color, this option will be selected by default. However, it is only enabled if Use Transparency Information is activated. If this option is selected, white is used as the background color when applying transparency information.

File Defined Background Color If a PNG graphic was saved with a non-white background color, and Use Transparency Information is selected, this option is selected by default. If you don't want to use the default background color, click White Background to import the graphic with a white background, or deselect Use Transparency Information to import the graphic without any transparency (displaying areas of the graphic that are currently transparent). Some image-editing programs can't specify a non-white background color for PNG graphics.

Apply Gamma Correction Select this option to adjust the gamma (midtone) values of a PNG graphic as you place it. This option lets you match image gamma to the gamma of the device you will use to print or display the graphic (such

as a low-resolution or non-PostScript printer or computer monitor). Deselect this option to place the image without applying any gamma correction. By default, this option is selected if the PNG graphic was saved with a gamma value.

Gamma Value This option, available only if Apply Gamma Correction is selected, displays the gamma value that was saved with the graphic. To change the value, type a positive number from 0.01 to 3.0.

When PNG files are imported, the settings in the Image Import Options dialog box are always based on the selected file, not on the default or last-used settings.

Acrobat (.pdf) and Illustrator (.ai) import options

The layout, graphics, and typography in a placed PDF are preserved. As with other placed graphics, you cannot edit a placed PDF page within InCopy . You can control the visibility of layers in a layered PDF. You can also place more than one page of a multipage PDF.

When you place a PDF that was saved with passwords, you'll be prompted to enter the required passwords. If the PDF file was saved with usage restrictions (for example, no editing or printing), but no passwords, you can place the file.

When you place a PDF (or a file saved with Illustrator 9.0 or later) and select Show Import Options in the Place dialog box, you'll see a dialog box containing the following options:

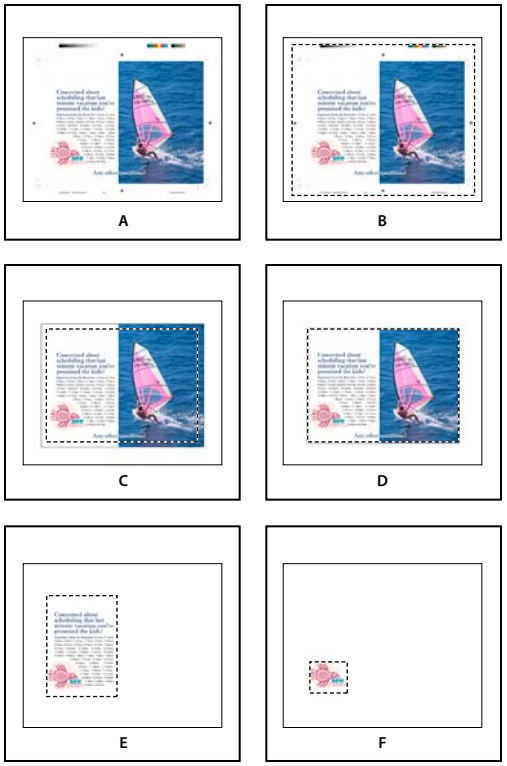
Show Preview Preview a page in the PDF before you place it. If you're placing a page from a PDF that contains multiple pages, click the arrows, or type a page number under the preview image to preview a specific page.

Pages Specify the pages you want to place: the page displayed in the preview, all pages, or a range of pages. For Illustrator files, you can specify which artboard to place.

If you specify multiple pages, hold down Alt (Windows) or Option (Mac OS) while placing the file to place them all at the same time, overlapping each other.

Crop To Specify how much of the PDF page to place:

- **Bounding Box** Places the PDF page's bounding box, or the minimum area that encloses the objects on the page, including page marks.
- **Art** Places the PDF only in the area defined by a rectangle that the author created as a placeable artwork (for example, clip art).
- **Crop** Places the PDF only in the area that is displayed or printed by Adobe Acrobat.
- **Trim** Identifies the place where the final produced page will be physically cut in the production process, if trim marks are present.
- **Bleed** Places only the area that represents where all page content should be clipped, if a bleed area is present. This information is useful if the page is being output in a production environment. Note that the printed page may include page marks that fall outside the bleed area.
- **Media** Places the area that represents the physical paper size of the original PDF document (for example, the dimensions of an A4 sheet of paper), including page marks.



Options for cropping placed PDFs
A. *Media* ***B.*** *Content* ***C.*** *Bleed* ***D.*** *Trim* ***E.*** *Crop* ***F.*** *Art*

Transparent Background Select this option to reveal text or graphics that fall beneath the PDF page in the InCopy layout. Deselect this option to place the PDF page with an opaque white background.

If you make the background transparent in a frame containing a PDF graphic, you can make it opaque later by adding a fill to the frame.

Fit a graphic to its frame

When you place or paste a graphic into a frame, it appears at the upper left corner of the frame by default. If the frame and its content are different sizes, you can use the Fitting commands to achieve a perfect fit.

1 Select the graphic with the Position tool .

2 Choose Object > Fitting and one of the following options:

Fit Content To Frame Resizes content to fit a frame and allows the content proportions to be changed. The frame will not change, but the content may appear to be stretched if the content and the frame have different proportions.

Center Content Centers content within a frame. The proportions of the frame and its content are preserved.

Fit Content Proportionally Resizes content to fit a frame while preserving the content proportions. The frame's dimensions are not changed. If the content and the frame have different proportions, some empty space will result.

Fill Frame Proportionally Resizes content to fit a frame completely while preserving the content proportions. The frame's dimensions are not changed.

Note: *The Fitting commands fit the content outer edges to the center of the frame's stroke. If the frame has a thick stroke weight, outer edges of the content will be obscured. You can adjust the frame's stroke alignment to the center, inside, or outside of a frame edge.*

See also

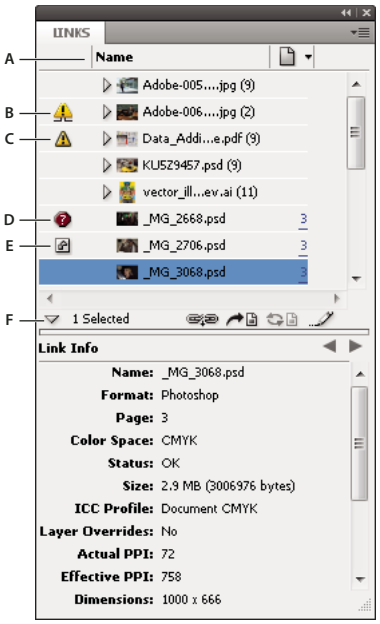
"Keys for moving and transforming graphics" on page 279

Links panel overview

All files placed in a document are listed in the Links panel. These include both local (on disk) files and assets that are managed on a server. However, files that are pasted from a website in Internet Explorer do not display in this panel.

In InCopy, the Links panel also displays linked stories. When you select a linked story in the Links panel, the Link Info section displays information such as the number of notes, the managed status, and the status of tracked changes.

Note: *If you're working with files from an Adobe Version Cue project, the Links panel displays additional file information.*



Links panel
A. *Category columns* ***B.*** *One or more instances modified icon* ***C.*** *Modified icon* ***D.*** *Missing-link icon* ***E.*** *Embedded-link icon* ***F.*** *Show/Hide Link Information*

When the same graphic appears several times in the document, the links are combined under a disclosure triangle in the Links panel. When a linked EPS graphic or InCopy document contains links, the links are also combined under a disclosure triangle.

A linked file can appear in the Links panel in any of the following ways:

Up to Date An up-to-date file is blank in the Status column.

Modified This icon means that the version of the file on disk is more recent than the version in your document. For example, this icon appears if you import a Photoshop graphic into InCopy , and then you or someone else edits and saves the original graphic in Photoshop.

A slightly different version of the Modified icon appears when a graphic is modified and one or more instances are updated while others are not.

Missing The graphic is no longer in the location from which it was imported, although it may still exist somewhere. Missing links can happen if someone deletes the original file or moves it to a different folder or server after it's been imported. You can't know whether a missing file is up to date until its original is located. If you print or export a document when this icon is displayed, the file may not print or export at full resolution.

Embedded Embedding the contents of a linked file suspends management operations for that link. If the selected link is currently in an "edit in place" operation, this option is not enabled. Unembedding the file restores management operations to the link.

If a linked object does not appear on a specific document page, the following codes indicate where the object appears: PB (pasteboard), MP (master page), OV (overset text), and HT (hidden text).

For a video tutorial on using the Links panel, see www.adobe.com/go/lrvid4027_id.

See also

"Adobe Version Cue" on page 38

Links panel video

Use the Links panel

- To display the Links panel, choose Window > Links. Each linked file and automatically embedded file is identified by name.
- To select and view a linked graphic, select a link in the Links panel and then click the Go To Link button , click the page number of the link in the Page column, or choose Go To Link in the Links panel menu. InCopy centers the display around the selected graphic. To view a hidden object, you show the layer (or condition if it's an anchored object).
- To expand or collapse nested links, click the triangle icon to the left of the link. Nested links occur when the same graphic appears several times in the document or when the linked EPS graphic or InCopy document contains links.
- To sort links in the panel, click the category title at the top of the Links panel to sort by that category. Click the same category again to reverse the order. For example, if you click the Page category, the links appear in their order from the first page to the last page. If you click Page again, the links are sorted from last page to first. Use Panel Options to add columns to the Links panel.

Work with Links panel columns

You can display additional categories, such as Creation Date and Layer, in the Links panel to display more information about the graphics. For each category, you can determine whether the information appears as a column in the Links panel and in the Link Info section at the bottom of the Links panel.

1 Choose Panel Options from the Links panel menu.

2 Select the check boxes under Show Column to add columns in the Links panel.

Folder 0 is the folder that contains the linked file; Folder 1 is the folder that contains Folder 0, and so on.

3 Select the check boxes under Show In Link Info to display the information in the Link Info section at the bottom of the Links panel.

4 Click OK.

You can change the order of columns by selecting a column and dragging it to a different location. Drag the column boundaries to change the column width. Click a category title to sort the links by that category in ascending order. Click again to sort in descending order.

Change the Links panel rows and thumbnails

1 Choose Panel Options from the Links panel menu.

2 For Row Size, select Small Rows, Regular Rows, or Large Rows.

3 For Thumbnails, determine whether thumbnail representations of the graphics appear in the Name column and in the Link Info section at the bottom of the Links panel.

4 Click OK.

Display link information

The Link Info section of the Links panel lists information about the selected linked file.

To change the information displayed in the Link Info section of the Links panel, choose Panel Options from the Links panel menu, and select check boxes in the Show In Link Info column.

❖ Double-click a link, or select a link and click the Show/Hide Link Information icon, which is a triangle on the left side of the panel.

View metadata via the Links panel

If a linked or embedded file contains metadata, you can view the metadata using the Links panel. You cannot edit or replace metadata associated with a linked file.

❖ Select a file in the Links panel and choose Utilities > XMP File Info from the panel menu.

Update, restore, and replace links

Use the Links panel to check the status of any link, or to replace files with updated or alternate files.

When you update or reestablish (relink) a link to a file, any transformations performed in InCopy are preserved (if you choose Relink Preserved Dimensions in the File Handling preferences). For example, if you import a square graphic and rotate it 30°, and then you relink it to an unrotated graphic, InCopy rotates it 30° to match the layout of the graphic it's replacing.

Note: *Placed EPS files may contain OPI links, which appear in the Links panel. Don't relink OPI links to files other than those originally intended by the creator of the EPS file; doing so can cause problems with font downloading and color separations.*

Choose how relinked graphics are scaled

When you relink to replace one graphic with a different source file, you can keep the image dimensions of the file that's being replaced, or you can display the incoming file in its actual dimensions.

1 Choose Edit > Preferences > File Handling (Windows) or InCopy > Preferences > File Handling (Mac OS).

2 Choose Preserve Image Dimensions When Relinking if you want images to appear at the same size as the images they're replacing. Deselect this option to have relinked images appear at their actual size.

Update modified links

InDesign first looks for a missing link in the folder in which another file has been relinked in the current session. Next, it looks for a link in the same folder where the document is located. If it's still not found, it looks in the parent folder of the document.

Modified links are also called "out of date" links.

❖ In the Links panel, do one of the following:

- To update specific links, select one or more links marked with the modified-link icon . Then click the Update Link button , or choose Update Link from the Links panel menu.

- To update all modified links, choose Update All Links from the Links panel menu, or Alt-click (Windows) or Option-click (Mac OS) the Update Link button.
- To update only one link to a graphic that appears in several places in the document, select only the sublink and choose Update Link. If you select the "parent" link, you can update all links to the modified graphic.

Replace a link with a different source file

1 Select any link in the Links panel, and click the Relink button or choose Relink from the Links panel menu. If a "parent" link of multiple instances is selected, choose Relink All Instances Of *[Filename]* from the Links panel menu.

Relink is disabled in managed stories unless a story is checked out.

2 In the dialog box that appears, select Search For Missing Links In This Folder if you want InCopy to search the folder for files that have the same names as other missing linked files. If this option is not selected, only the selected image is relinked.

3 Choose Show Import Options to control how the new source file is imported.

4 Locate and double-click the new source file.

5 Choose import options if you clicked the Show Import options option. (See "Import options for graphics" on page 48.)

Restore missing links

1 To restore a missing link, select any link marked with the missing link icon in the Links panel, and click the Relink button .

2 In the dialog box that appears, select Search For Missing Links In This Folder to relink any missing file that appears in the specified folder. Locate and double-click a file.

Find missing links

By default, InCopy checks for missing links and tries to resolve them when you open a document. Two preference options let InCopy check for and find missing links automatically when you open a document.

Check Links Before Opening Document If you turn off this option, InCopy opens the document immediately, and the link statuses remain pending until links are determined to be up-to-date, missing, or modified. If you turn on this option, InCopy checks for modified or missing links.

Find Missing Links Before Opening Document If you turn off this option, InCopy does not attempt to resolve the missing links. You may want to turn off this option if links slow performance to a server or if unexpected linkings occur. This option is dimmed if Check Links Before Opening Document is turned off.

Search For Missing Links Use the Search For Missing Links command to search for and resolve missing links in your document. This command is useful if you turned off the preferences option that checks for missing links when you open a document, and now you have missing links. This command is also useful if you mount a server where images are stored after opening a document.

- To change link settings, open the File Handling section of the Preferences dialog box, and determine whether the Check Links Before Opening Document and Find Missing Links Before Opening Document options are selected.
- To let InCopy attempt to resolve missing links, choose Utilities > Search For Missing Links from the Links panel menu.

This command is dimmed if the document contains no missing links.

Specify a default Relink folder

1 In the Preferences dialog box, select File Handling.

2 From the Default Relink Folder menu, choose either of the following options, and then click OK:

Most Recent Relink Folder This option displays the most recently used folder you selected when relinking, matching InCopy CS3 behavior.

Original Relink Folder This option displays the original location of the linked file, matching the behavior of InCopy CS2 and earlier.

Copy links to a different folder

Use the Copy Link(s) To command to copy graphics files to a different folder and redirect the links to the copied files. This command is especially useful for moving files to a different drive, such as moving files from a DVD to a hard drive.

1 Select the links to the files you want to copy, and choose Utilities > Copy Link(s) To from the Links panel menu.

2 Specify the folder where the linked files will be copied and choose Select (Windows) or Choose (Mac OS).

Relink to a different folder

When you use the Relink To Folder command, you can point to a folder that contains files with the same names as your out-of-date links. For example, if your current links point to low-resolution images, you can specify a different folder that contains high-resolution images. You can specify a different extension for the files, allowing you to change links from .jpg to .tiff, for example.

The Relink To Folder command is dimmed in a managed InCopy story unless the story is checked out.

1 Select one or more links in the Links panel.

2 Choose Relink To Folder from the Links panel menu.

3 Specify the location of the new folder.

4 To use a different extension, select Match Same Filename But This Extension, and specify the new extension (such as AI, TIFF, or PSD).

5 Click Select (Windows) or Choose (Mac OS).

Replace an imported file using the Place command

1 Do one of the following:

- To replace the contents of a graphics frame, such as an imported graphic, use the Position tool to select the image.
- To replace the contents of a text frame, use the Type tool to click an insertion point in a text frame, and choose Edit > Select All.

2 Choose File > Place.

3 Locate and select the new file.

4 Click Open.

Copy the link pathname

You can copy either the full path of the linked image or the platform style path. Copying the full path of the image is useful for notifying team members where art is located. For example, you can copy the full path and paste it into an email message. Copying the platform path is useful for scripting or for specifying image fields in a data merge.

1 Select a link in the Links panel.

2 From the Links panel menu, choose Utilities > Copy Full Path or Copy Platform Style Path.

3 Paste the path.

Edit original artwork

The Edit Original command lets you open most graphics in the application in which you created them so that you can modify them as necessary. Once you save the original file, the document in which you linked it is updated with the new version.

Note: *In InDesign, if you check out and select a managed graphics frame (one that has been exported to InCopy), rather than the graphic itself, the graphic opens in InCopy.*

Edit original artwork using the default application

By default, InCopy relies on the operating system to determine which application is used when opening the original. If you edit artwork using a different application, InCopy uses the most recently used application.

1 Do any of the following:

- In the Links panel, select the link and click the Edit Original button . Alternatively, choose Edit Original from the panel menu.
- Select the linked artwork on the page, and choose Edit > Edit Original.

2 After making changes in the original application, save the file.

Edit original artwork using a different application

1 Select the image.

2 Choose Edit > Edit With, and then specify the application you want to use to open the file. If the application does not appear, choose Other, and browse to locate the application.

Control layer visibility in imported images

When you import Photoshop PSD files, layered PDFs, and INDD files, you can control the visibility of top-level layers. Adjusting layer visibility in InCopy lets you vary an illustration depending on context. For example, in a multilanguage publication, you can create a single illustration that includes one text layer for each language.

You can adjust layer visibility either when you place a file or by using the Object Layer Options dialog box. In addition, if the Photoshop file contains layer comps, you can display the desired comp.

Set layer visibility

1 Choose File > Place and select a graphics file.

2 Select Show Import Options, and then click Open.

3 In the Image Import Options or Place dialog box, click the Layers tab.

4 To view a preview of the image, click Show Preview.

5 (PDFs only) If you're placing a page from a multipage PDF, click the arrows, or type a page number under the preview image to preview a specific page.

6 (Photoshop PSD files only) If the image contains layer comps, choose the layer comp you want to display from the Layer Comp pop-up menu.

7 Do one of the following:

- To open or close a layer set, click the triangle to the left of the folder icon.
- To hide a layer or layer set, click the eye icon next to the layer or layer set.
- To display the layer or layer set, click the empty eye column next to the layer or layer set.
- To display only the content of a particular layer or layer set, Alt-click (Windows) or Option-click (Mac OS) its eye icon. Alt-click or Option-click the eye icon again to restore the original visibility settings of the other layers.
- To change the visibility of multiple items, drag through the eye column.

8 Set the When Updating Link option as desired:

Use Photoshop's/PDF's Layer Visibility Matches the layer visibility settings to those of the linked file when you update the link.

Keep Layer Visibility Overrides Maintains the layer visibility settings as specified in the InCopy document.

9 Click OK.

Set layer visibility for placed AI, PSD, PDF, and INDD files

After you place a Photoshop PSD or layered PDF, an Illustrator AI file, or an InDesign INDD file, you can control the visibility of its layers by using the Object Layer Options dialog box. If the Photoshop PSD file contains layer comps, you can choose which comp you want to display. In addition, you can choose whether to maintain the visibility settings or match the settings of the original file each time you update the link.

1 Select the file in the InCopy document.

2 Choose Object > Object Layer Options.

3 To view a preview of the image, select Preview.

4 (Photoshop PSD files only) If the image contains layer comps, choose the layer comp you want to display from the Layer Comp pop-up menu.

5 Do one of the following:

- To open or close a layer set, click the triangle to the left of the folder icon.
- To hide a layer or layer set, click the eye icon next to the layer or layer set.
- To display the layer or layer set, click the empty eye column next to the layer or layer set.
- To display only the content of a particular layer or layer set, Alt-click (Windows) or Option-click (Mac OS) its eye icon. Alt-click or Option-click the eye icon again to restore the original visibility settings of the other layers.
- To change the visibility of multiple items, drag through the eye column.

6 Set the Updating Link Options as desired:

Use Layer Visibility Matches the layer visibility settings to those of the linked file when you update the link.

Keep Layer Visibility Overrides Maintains the layer visibility settings as specified in the InCopy document.

7 Click OK.

Importing InDesign (.indd) pages

Using the Place command, you can import pages from one InDesign document into another. You can import a page, a page range, or all of the pages in the document. The pages are imported as objects (much the same way that PDFs are imported).

Add pages in your document to hold the pages you want to import. After you choose File > Place and select an INDD file, you can choose Show Import Options and then choose which pages to import, which layers to make visible, and how to crop the imported pages. You can scroll in the Preview window to examine the thumbnail pages closely. The page or pages you select are loaded in the graphics icon. If you place multiple pages, InCopy loads the graphics icon with the following page so you can import pages one after the other.

Note: *The Links panel lists the names of each page you imported. If a page you imported contains a graphic or other item that was imported into it, this item is listed as well in the Links panel. The names of these secondary imported items are listed under a disclosure triangle in the Links panel to distinguish them from imported pages.*

See also

"Control layer visibility in imported images" on page 57

Transforming graphics

Position tool overview

Click the Position tool in the toolbox to manipulate selected graphics, either directly, in conjunction with a Transform command (Object > Transform) or a command on a context menu, or by using keyboard shortcuts to nudge the graphic within its frame.

The Position tool is dynamic, automatically changing to reflect different states:

- When placed directly over an empty graphics frame or frame with unassigned content after using the File > Place command, it changes to the loaded graphics icon to indicate that you can import the graphic into that frame.
- When it's placed directly over a graphic, it changes to the Hand tool to indicate that you can select the graphic and manipulate it within the frame.
- When placed over the bounding box handle of an inline graphic, it changes to the resize arrow to indicate that dragging will resize the graphic.
- When placed over a graphics frame or the top-level container of nested frames, it changes to the object select icon to indicate that you can select the graphic or nested frame under the pointer. You cannot select the frame itself.
- When placed over a text frame, it changes to the I-beam to indicate a text insertion point.

Set Position tool options

When using the Position tool to move a graphic, you can hold down the mouse button for a few seconds to display a dynamic graphics preview (a ghosted-back image) of any part of the image that is outside the frame. You can control the display and delay of the preview.

1. Double-click the Position tool in the toolbox.
2. From the Show Masked Portion of Image menu, select the rate at which the entire image will appear while dragging, or select to turn it off entirely.

Transform graphics

You can use commands to move, scale, rotate, and shear graphics.

Move a graphic

1 Make sure the frame with the desired object is checked out to you, and then select the object using the Position tool .

2 Choose Object > Transform > Move.

3 In the Move dialog box, do one of the following:

- Enter the horizontal and vertical distances that you want the graphic to move. Positive values move the object down and to the right of the x axis; negative values move the object up and to the left.
- To move an object a precise distance and angle, enter the distance and angle for the move. The angle you enter is calculated in degrees from the x axis. Positive angles specify a counterclockwise move; negative angles specify a clockwise move. You can also enter values between 180° and 360°; these values are converted to their corresponding negative values (for example, a value of 270° is converted to –90°).

4 Do one of the following:

- To preview the effect before you apply it, select Preview.
- To move the object, click OK.

Scale a graphic

1 Make sure the frame with the desired object is checked out to you, and then select the object using the Position tool .

2 Choose Object > Transform > Scale.

3 In the Scale dialog box, make sure the Constrain Proportions icon is selected if you want to preserve the relative height and width of the object. Deselect this icon if you want to scale the X and Y values separately, which may result in the image being skewed.

4 Enter the horizontal and vertical scale values as either percentages (such as 90%) or distance values (such as 6p).

The scale values can be negative numbers.

5 Do one of the following:

- To preview the effect before you apply it, select Preview.
- To scale the object, click OK.

To scale the graphic in a specific direction, use the Position tool to drag the handle of a selected graphic. Pressing Shift forces proportional scaling.

Rotate a graphic

1 Make sure the frame with the desired object is checked out to you, and then select the object using the Position tool .

2 Choose Object > Transform > Rotate.

3 Enter the rotation angle, in degrees, in the Angle text box. Enter a negative angle to rotate the object clockwise; enter a positive angle to rotate the object counterclockwise.

4 Do one of the following:

- To preview the effect before you apply it, select Preview.
- To rotate the object, click OK.

Shear a graphic

1 Make sure the frame with the desired object is checked out to you, and then select the object using the Position tool .

2 Choose Object > Transform > Shear.

3 In the Shear dialog box, enter the new shear angle.

The shear angle is the amount of slant to be applied to the object, relative to a line perpendicular to the shear axis. (Shear angle is calculated clockwise from the current axis.)

4 Specify the axis along which the object is to be sheared. You can shear an object along a horizontal, a vertical, or an angled axis.

If you choose an angled axis, enter the angle of the axis that you want, in degrees, relative to the perpendicular axis.

5 Do one of the following:

- To preview the effect before you apply it, select Preview.
- To shear the object, click OK.

Clear transformations to a graphic

1 Make sure the frame with the desired object is checked out to you, and then select the object using the Position tool .

2 Choose Object > Transform > Clear Transformations.

Controlling graphics display

Control graphics' display performance

You can control the resolution of graphics placed in your document. You can change the display settings for the entire document or for individual graphics. You can also change a setting that either allows or overrides the display settings for individual documents.

See also

"Customize the display performance options" on page 63

Change a document's display performance

A document always opens using the default Display Performance preferences. You can change the display performance of a document while it is open, but the setting won't be saved with the document.

If you've set the display performance of any images separately, you can override the settings so all objects use the same settings.

1 Choose View > Layout View.

2 Choose View > Display Performance, and select an option from the submenu.

3 To force objects that you have set individually to display using the document setting, deselect View > Display Performance > Allow Object-Level Display Settings. (A check mark indicates it is selected.)

Change an object's display performance

1 Choose View > Layout View.

2 To preserve the display performance for individual objects when the document is closed and reopened, make sure Preserve Object-Level Display Settings is selected in Display Performance preferences.

3 Choose View > Display Performance, and make sure Allow Object-Level Display Settings is selected.

4 Select an imported graphic using the Position tool .

5 Do one of the following:

- Select Object > Display Performance, and choose a display setting.
- Right-click (Windows) or Control-click (Mac OS) the image, and choose a display setting from the Display Performance submenu.

To remove an object's local display setting, choose Use View Setting in the Display Performance submenu. To remove local display settings for all graphics in the document, select Clear Object-Level Display Settings in the View > Display Performance submenu.

Display performance options

These options control how graphics are displayed on the screen, but they do not affect the print quality or exported output.

Use Display Performance preferences to set the default option used to open all documents, and customize the settings that define those options. Each display option has separate settings for displaying raster images, vector graphics, and transparencies.

Fast Draws a raster image or vector graphic as a gray box (default). Use this option when you want to quickly page through spreads that have lots of images or transparency effects.

Typical Draws a low-resolution proxy image (default) appropriate for identifying and positioning an image or vector graphic. Typical is the default option, and is the fastest way to display an identifiable image.

High Quality Draws a raster image or vector graphic at High Resolution (default). This option provides the highest quality but the slowest performance. Use this option when you want to fine-tune an image.

Note: *Image display options don't affect output resolution when exporting or printing images within a document. When printing to a PostScript device, exporting to XHTML, or exporting to EPS or PDF, the final image resolution depends on the output options you choose when you print or export the file.*

Set default display performance

The Display Performance preferences let you set the default display option, which InCopy uses for every document. You can change a document's display performance using the View menu, or change the setting for individual objects using the Object menu. For example, if you work on projects that contain numerous high-resolution photos (such as a catalog), you may prefer to have all your documents open quickly. You can set the default display option to Fast. When you want to see the images in more detail, you can switch the document view to Typical or High Quality (leaving the preference set to Fast).

You can also choose to view or override display settings applied to individual objects. If Preserve Object-Level Display Settings is selected, any settings applied to objects are saved with the document.

1 Select Edit > Preferences > Display Performance (Windows) or InCopy > Preferences > Display Performance (Mac OS).

2 For Default View, select Typical, Fast, or High Quality. The display option you choose applies to all documents you open or create.

3 Do one of the following:

- To save display settings applied to individual objects, select Preserve Object-Level Display Settings.
- To display all graphics using the default display option, deselect Preserve Object-Level Display Settings.

4 For Adjust View Settings, choose the display option you want to customize, and then move the slider for Raster Images or Vector Graphics to the desired setting.

5 Click OK.

Each display option has separate settings for raster (bitmap) images, vector graphics, and transparency effects.

Customize the display performance options

You can customize the definitions of each display performance option (Fast, Typical, and High Quality). Each display option has separate settings for raster (bitmap) images, vector graphics, and transparency effects.

Managed (linked) InCopy stories include low-resolution proxy data for images so that the full-resolution image doesn't have to be downloaded from the server whenever the file is checked out.

1 Select Edit > Preferences > Display Performance (Windows) or InCopy > Preferences > Display Performance (Mac OS).

2 For Adjust View Settings, choose the display option you want to customize.

3 For each display option, move the slider for Raster Images or Vector Graphics to the desired setting:

Gray Out Draws an image as a gray box.

Proxy Draws images at proxy resolution (72 dpi).

High Resolution Draws images at the maximum resolution supported by the monitor and current view settings.

4 For each display option, move the slider for Transparency to the desired setting:

Off Displays no transparency effects.

Low Quality Displays basic transparency (opacity and blend modes), and transparency effects (drop shadow and feather) are shown in a low-resolution approximation.

Note: *In this mode, page contents are not isolated from the background; therefore, objects with blend modes other than Normal might appear different in other applications and final output.*

Medium Quality Displays low-resolution drop shadows and feathers. This mode is recommended for most work unless the document is particularly transparency-heavy, or has many transparency effects.

High Quality Displays higher-resolution (144 dpi) drop shadows and feathers, CMYK mattes, and spread isolation.

Note: *When a document's blending space is CMYK and you have either enabled the overprint preview mode or soft proofing, opacity matting is done in CMYK rather than RGB. This means that partially transparent CMYK colors display as tinted CMYK colors.*

5 To view anti-aliasing for text, stroke, fill, and other page items, choose Enable Anti-aliasing. If text is converted to outlines, then the resulting outlines can be anti-aliased (Mac OS only).

6 To set the point size below which text displays as a dimmed bar, type a value for Greek Type Below.

7 Click OK.

To reset all controls back to the original default settings, click Use Defaults.

Including metadata in a story

Work with metadata

Metadata is a set of standardized information about a file, such as author name, resolution, color space, copyright, and keywords applied to it. You can use metadata to streamline your workflow and organize your files.

About the XMP standard

Metadata information is stored using the Extensible Metadata Platform (XMP) standard, on which Adobe Bridge , Adobe Illustrator, Adobe InDesign, and Adobe Photoshop are built. XMP is built on XML, and in most cases the metadata is stored in the file. If it isn't possible to store the information in the file, metadata is stored in a separate file called a *sidecar file*. XMP facilitates the exchange of metadata between Adobe applications and across publishing workflows. For example, you can save metadata from one file as a template, and then import the metadata into other files.

Metadata that is stored in other formats, such as Exif, IPTC (IIM), GPS, and TIFF, is synchronized and described with XMP so that it can be more easily viewed and managed. Other applications and features (for example, Adobe Version Cue) also use XMP to communicate and store information such as version comments, which you can search using Adobe Bridge.

In most cases the metadata remains with the file even when the file format changes, for example, from PSD to JPG. Metadata is also retained when files are placed in an Adobe document or project.

You can use the XMP Software Development Kit to customize the creation, processing, and interchange of metadata. For example, you can use the XMP SDK to add fields to the File Info dialog box. For more information on XMP and the XMP SDK, visit the Adobe website.

Working with metadata in Adobe Bridge and Adobe Creative Suite components

Many of the powerful Adobe Bridge features that allow you to organize, search, and keep track of your files and versions depend on XMP metadata in your files. Adobe Bridge provides two ways of working with metadata: through the Metadata panel and through the File Info dialog box (InDesign) or the Content File Info dialog box (InCopy).

In some cases, multiple views exist for the same metadata property. For example, a property may be labeled Author in one view and Creator in another, but both refer to the same underlying property. Even if you customize these views for specific workflows, they remain standardized through XMP.

Add metadata using the File Info dialog box

The File Info dialog box displays camera data, file properties, an edit history, copyright, and author information of the current document. The File Info dialog box also displays custom metadata panels. You can add metadata directly in the File Information dialog box. Any information you enter in a field overrides existing metadata and applies the new value to all selected files.

1 Choose File > File Info (InDesign) or File > Content File Info (InCopy).

2 Select any of the following from the tabs at the top of the dialog box:

Use the Right and Left arrows to scroll the tabs, or click the down-pointing arrow and choose a category from the list.

Description Lets you enter document information about the file, such as document title, author, description, and keywords that can be used to search for the document. To specify copyright information, select Copyrighted from the Copyright Status pop-up menu. Then enter the copyright owner, notice text, and the URL of the person or company holding the copyright.

IPTC Includes four areas: IPTC Content describes the visual content of the image. IPTC Contact lists the contact information for the photographer. IPTC Image lists descriptive information for the image. IPTC Status lists workflow and copyright information.

Camera Data Includes two areas: Camera Data 1 displays read-only information about the camera and settings used to take the photo, such as make, model, shutter speed, and f-stop. Camera Data 2 lists read-only file information about the photo, including pixel dimensions and resolution

Video Data Lists information about the video file, including video frame width and height, and lets you enter information such as tape name and scene name.

Audio Data Lets you enter information about the audio file, including the title, artist, bit rate, and loop settings.

Mobile SWF Lists information about mobile media files, including title, author, description, and content type.

Categories Lets you enter information based on Associated Press categories.

Origin Lets you enter file information that is useful for news outlets, including when and where the file was created, transmission information, special instructions, and headline information.

DICOM Lists patient, study, series, and equipment information for DICOM images.

History Displays Adobe Photoshop history log information for images saved with Photoshop. The History tab appears only if Adobe Photoshop is installed.

Illustrator Lets you apply a document profile for print, web, or mobile output.

Advanced Displays fields and structures for storing metadata by using namespaces and properties, such as file format and XMP, Exif, and PDF properties.

Raw Data Displays XMP text information about the file.

3 Type the information to add in any displayed field.

4 Click OK to apply the changes.

Export metadata as an XMP file

You can save metadata in an XMP file to share with other users. These XMP files can be used as templates for populating InCopy documents and other documents created with XMP-enabled applications. Templates you export are stored in a shared location that all XMP-enabled applications can access. They also appear in the pop-up menu at the bottom of the File Info dialog box.

1 Choose File > File Info (InDesign) or File > Content File Info (InCopy).

2 Choose Export from the pop-up menu at the bottom of the dialog box.

3 Type a filename, choose a location for the file, and click Save.

To view metadata templates in Explorer (Windows) or the Finder (Mac OS), click the pop-up menu at the bottom of the File Info dialog box and choose Show Templates Folder.

Import metadata from an XMP file

When you import metadata into a document from an exported XMP template file, you can specify whether to clear all metadata in the current document and add the new metadata, keep all but the matching metadata, or add matching metadata to the existing metadata.

❖ Choose File > File Info (InDesign) or File > Content File Info (InCopy).

• Choose an XMP file from the pop-up menu at the bottom of the dialog box, select an import option, and click OK.

- Choose Import from the pop-up menu at the bottom of the dialog box, select an import option, and click OK. Then double-click the XMP template file you want to import.

Chapter 4: Sharing content between InCopy and InDesign

Adobe InCopy is a professional writing and editing program that integrates tightly with Adobe InDesign. Large-to-medium publishers can acquire powerful editorial solutions based on InCopy and InDesign from systems integrators and third-party developers. Smaller publishing groups can set up an affordable, flexible editorial workflow system using a version of InCopy available directly from Adobe.

Understanding a basic managed-file workflow

Sharing content

The Adobe InCopy LiveEdit Workflow plug-ins let writers and editors develop copy in InCopy at the same time as designers prepare layouts in Adobe InDesign. This workflow includes container files, called *assignments,* for grouping related pieces of content, and file-locking and notification tools for sharing and updating files in InCopy or InDesign over a shared network or in compressed packages that can be distributed via e-mail.

In the shared network workflow, InDesign users export text and graphics to a shared location on a file system, where the files become available to InCopy users who will write and edit the content. Selected text frames and graphics frames are either exported to the assignment or exported as separate InCopy files, where they become part of the managed process and are linked to the InDesign document. These shared files are referred to as *managed files*. When users work in the assignment file or in the InDesign file on a local server, changes to the associated layout or content are communicated to all users involved in the workflow for that document.

Multiple InCopy or InDesign users can open the same content file simultaneously, and multiple InCopy users can open the same assignment file simultaneously. However, only one user at a time can *check out* the InCopy file for editing. Others can view the file on a read-only basis. The user who checks out a managed InCopy file can share his or her work with other users by saving the file to the shared server or by returning the file to the InDesign user; however, other users can't make changes to the file until it's checked back in. This system allows multiple users to access the same file but prevents users from overwriting each other's work.

For more information, see the InCopy LiveEdit Workflow guide (PDF) at www.adobe.com/go/learn_liveedit.

See also

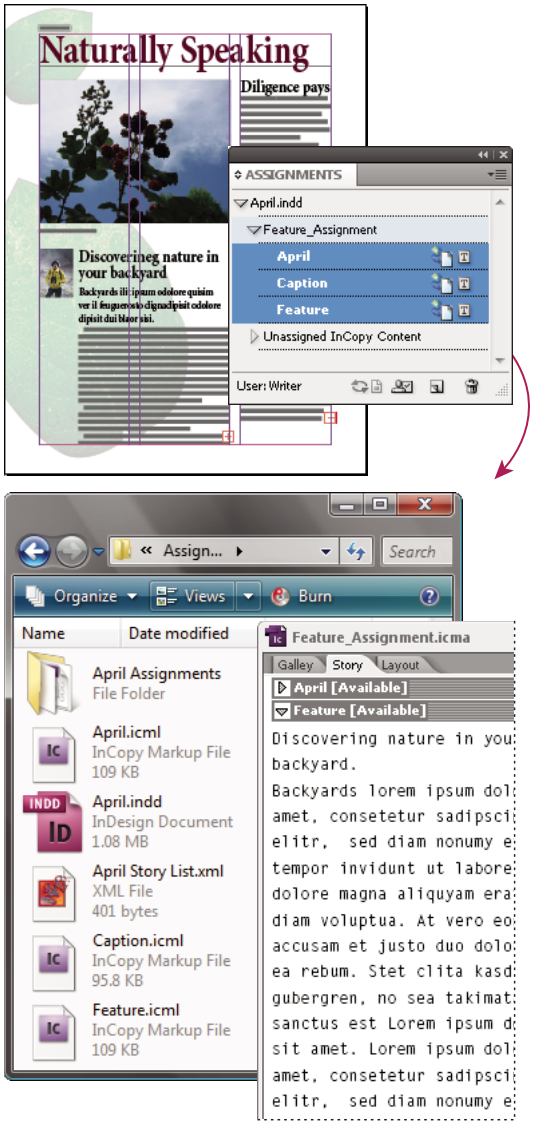
"Managed files" on page 69

Ways to work with content in InCopy

Content is either a body of text that flows through one or more frames, or an imported graphic. There are five basic ways to work on content in InCopy: open an assignment file, open an assignment package, open a linked InCopy file, open an InDesign file that has linked InCopy files, or compose content entirely in InCopy.

Open assignment files created in InDesign

InDesign users can create an assignment file and designate content for sharing. This method lets the InDesign user associate related components (heading, body, graphics, captions, and so on), and then assign them to different InCopy users for writing and editing. InCopy users open the assignment file and work on only the components assigned to them. The live layout view shows how their edited copy relates to the InDesign layout, without opening the entire InDesign document. However, if the layout changes, the InDesign user must update assignments to notify InCopy users about the changes. You can share assignment files on a server or through assignment packages.



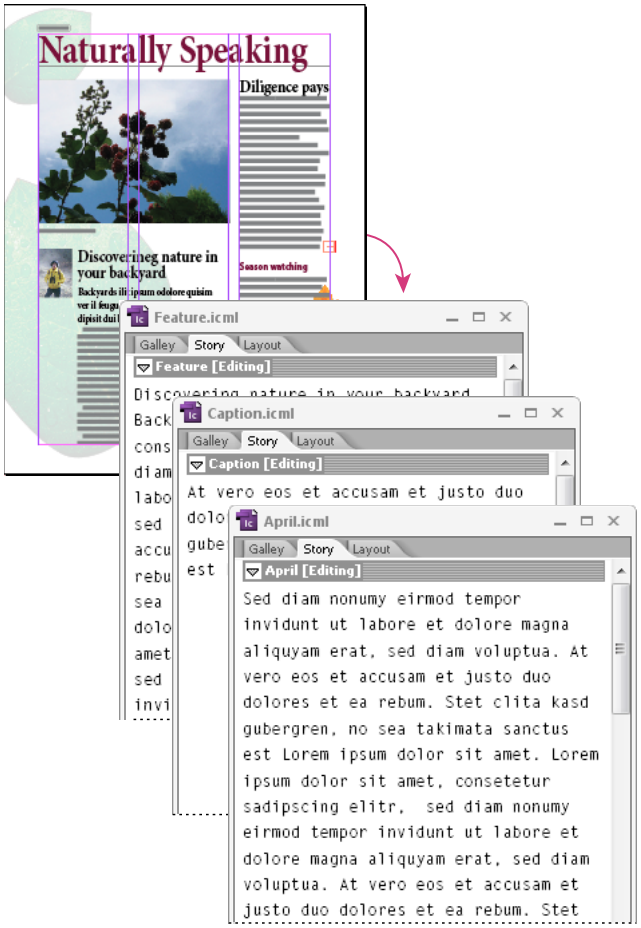
InDesign document (.indd) with assignment file (.icml) composed of three linked content files (.incx). Assignment and its components are listed in Assignments panel and are opened in InCopy.

Open assignment packages

The assignment packages workflow is especially useful when designers and writers are working on the same project but don't have access to a local server. In such cases, the InDesign user can create one or more packages and send the compressed files to the assigned InCopy users via e-mail. InCopy users can open the assignment packages, edit the contents, and return the packages to the InDesign user, who can then update the document.

Open linked InCopy files exported from InDesign

In certain workflows, InDesign users might export text and graphics as separate files, rather than wrapping them inside an assignment file. Exporting separate files is useful if you work on unrelated graphics or bodies of text. However, InCopy users aren't able to see how the content fits within the InDesign layout.



InDesign document (.indd) with three linked but unassigned content files (.icml) opened in InCopy

Open InDesign documents that have linked InCopy files

To see all page items in the context of an entire layout, InCopy users can open and edit an InDesign document in InCopy. This approach can be useful for editing and copyfitting if seeing the overall layout is important, or for editing most of the stories in a document rather than a few. After the InCopy user edits the stories, the InDesign user can then update the links to the modified files. If the InDesign user changes the layout, the InCopy user is notified when the InDesign document is saved.

Compose content entirely in InCopy

You can create content in InCopy that isn't associated with an InDesign file. In these stand-alone documents, you can type text, assign fonts and styles, and import graphics from other applications (such as Adobe Illustrator and Adobe Photoshop) to enhance the text. You can also assign tags for future XML use. This approach is a good option in an editorial workflow where the content precedes the design. You can also set up and modify the text area, page size, and orientation for stand-alone InCopy documents. But if the story is later linked to an InDesign document, the InDesign settings override the settings used in InCopy.

See also

"Work with stand-alone documents" on page 34

Managed files

For a file to be managed, it must be added to an assignment file, exported from InDesign as InCopy content, or placed as InCopy content into InDesign. Managed files communicate both content status and ownership. With managed files, you can:

- Lock and unlock stories to help preserve file integrity.
- Notify InCopy users when the associated InDesign layout is outdated.
- Identify the user working on a file.
- Notify users when an InCopy content file is outdated, being used by someone, or available for editing. Notification methods include alert messages, frame icons, status icons in the Links panel, and status icons in the Assignments panel.

Read-only files

Once a content file becomes managed, it's *read-only* to all users in the workflow at all times, except to the person who has checked it out. The software creates a lock file (*.idlk) when a user checks out a content file, giving that user exclusive editing control. Read-only files have the following characteristics:

- An InCopy user cannot manually format the text in it. However, if text has been assigned character or paragraph styles, an InDesign user can change the definition of those styles, thereby changing the formatting of the text even when the file is checked out to someone else. These style definition changes are reflected in the text once the InDesign user updates the file.
- In general, neither an InCopy nor InDesign user can change objects, such as text and applied styles, in locked InCopy content. Some objects, such as character and paragraph styles, are only *used* by the content. For example, you can't change how a character style is applied to objects in locked content, but you can change the character style itself, thereby changing the appearance of the text.
- An InDesign user can change the margins and columns of the text content as well as the shape, location, and number of text frames the story occupies.
- An InDesign user can change the geometry and formatting of a graphics frame without checking out the graphic. An InCopy user cannot change a graphics frame or any formatting on the frame. However, both InDesign and InCopy users have to check out the graphics frame in order to modify the graphic itself (for example, to rotate or scale it).

Best practices for working with managed files

Use the following practices to make sure that you work with the most up-to-date content and don't overwrite someone else's work:

- Store assignment files on a server where all team members have access. If team members don't have access to a server, you can create and distribute assignment packages.
- When you create an assignment, a special folder is created to hold the assignment file and the content. Use these assignment folders to maintain assignment and content files. They simplify managing the shared files across a workgroup and help ensure that users open the correct files.

- In InCopy, open the assignment file instead of an individual InCopy story. That way, you can see the copyfit and layout information in Galley and Layout views. If you export content without using assignment files, you can see copyfit and layout information only by opening the InDesign file.
- As soon as you open an assignment file, open an InDesign document, or check out content in either InDesign or InCopy; make sure that frame edges are showing (View > Show Frame Edges) so that you can see the frame icons when they appear.
- In InDesign, if you must remove files from the workflow (because of a production deadline, for example), you can unlink them or cancel an assignment package.

See also

"Unlink content files (InDesign)" on page 88

Managed-file workflow examples

When you establish workflow management between InCopy and InDesign, writers and editors can compose, rewrite, expand, and edit documents at the same time that designers prepare the layout. Common workflows include managing files on a local server, sharing files via e-mail packages, or using some combination of the two methods.

These workflows assume that you have a basic InDesign template with layout geometries, styles, and placeholder text. Layout geometries include page dimensions as well as text and graphics frames. InCopy uses these items to show proper copyfit information.

Local server workflow

1. In InDesign, create assignments and add content to them.

This step incorporates exported text and graphics frames into the managed process, where they become available to InCopy users for writing and editing.

2. Make the assignment files available to InCopy users.

Save the files to a server that all workflow users have access to.

3. In InCopy, open the assignment file, and check out and edit a story or graphic.

In InCopy, the files containing content assigned to you appear in the Assignments panel. Whenever you save the file on a local server, the changes are saved on the file system and anyone working on that document (the InDesign layout or another managed content file in the document) receives notification of the changes. Those users can update the content to view the latest changes. The content remains checked out to you until you check it in.

4. In InDesign, work on the layout.

Regardless of whether the content files are being edited in InCopy, InDesign users can work on the document layout; they don't have to check out the document. Whenever the InCopy user saves the checked-out content, the InDesign user can update that content within the layout to see the latest revisions.

5. In InCopy, continue working.

When finished with your edits, check in the content. Other users are then able to check out the content and work on it. If a user is modifying the layout in InDesign simultaneously, you can update and view the layout geometry as you work.

6. In InDesign, make sure that all the content is checked in.

The managed workflow makes it possible to know who has checked out files. After content files are checked in, InDesign users can check out the files to finalize the layout as necessary.

E-mail package workflow

1. In InDesign, create and send assignment packages.

Create assignment packages and assign contents to the appropriate InCopy users, and then send the packages to the InCopy users. The packaged files are automatically checked out to help avoid editing conflicts.

2. In InCopy, open the assignment package, and check out and edit a story or graphic.

If you receive an assignment package in e-mail, double-click the package to open it in InCopy. Changes you make to the file are saved only locally. Other users are not notified when you make changes.

3. In InDesign, work on the layout.

Regardless of whether the content files are packaged, InDesign users can work on the document layout; they don't have to check out the document. If you need to update the layout or assignments, you can send an updated package to the InCopy users.

4. In InCopy, return the edited package.

When finished with your edits, check in the content and return the modified package. Other users are then able to check out the content, view the latest revisions, and work on the file.

5. In InDesign, make sure that all the content is checked in.

The managed workflow makes it possible to know who has checked out files. After assignment packages are returned, stories in assignment packages are checked in. InDesign users can check out the files to finalize the layout as necessary.

Enter user identification

All users in the workflow must have a user name. This identification reveals who has checked out a particular file and makes this information available to other users. It's also required in order to check out a file for editing.

If you've already specified a user name and want to change it, you must check in any content you have checked out. Otherwise, changing user identification during an editing session would forfeit your ability to edit content that you have checked out—it would be checked out to you under a different name.

User identification is application-specific; no single user can have multiple user identifications per application.

Note: *The InCopy Notes and Track Changes features also use the specified name to identify the author of a note or a tracked change.*

1 Do either of the following:

- Choose File > User.
- Choose User from the Assignments panel menu (Window > Assignments).

2 Type a unique name and click OK.

If you forget to specify a user name using this method, you're prompted to enter one when you attempt your first workflow action.

Note: *The Color pop-up menu in this dialog box is for identifying editorial notes and tracked changes. You can choose the color now if you want, but it doesn't affect anything you do in a managed workflow.*

See also

"Track changes" on page 130

"About editorial notes" on page 134

Workflow icons

Icons can appear on text and graphics frames, the Assignments panel, and in the story bar (InCopy only). Edit status icons appear next to the managed file in the Links panel and Assignments panel, and communicate content status. Icons appear on frames that contain a linked InCopy story (in the Layout view in both InDesign and InCopy). These icons also communicate content status and can be used to differentiate between managed and unmanaged content. The associated tool tip indicates editing status and ownership. To view the frame icons, make sure that frame edges are showing in InDesign and InCopy (View > Show Frame Edges).

Note: *(InDesign) The InDesign document window must be in Normal Mode for the frame edges to show. (Click the Normal Mode button* *at the lower left of the toolbox.)*

Icon	Name	Location
	Available	Assignments panel (InDesign and InCopy), text frames, and graphics frames
	In Use By *[name]*	Assignments panel, text frames, and graphics frames
	Editing	Assignments panel, text frames, and graphics frames
	Available And Out Of Date	Text and graphics frames
	In Use By *[name]* And Out Of Date	Text and graphics frames
	Editing And Out Of Date	Text and graphics frames
	Out Of Date	Assignments panel
	Text Content Out Of Date	Assignments panel and text frames
	Text Content Up To Date	Assignments panel and text frames
	Graphics Content Out Of Date	Assignments panel and graphics frames
	Graphics Content Up To Date	Assignments panel and graphics frames
	Packaged Content	Assignments panel

Note: *The Out Of Date icon on the Available, In Use, Editing, Text Content, and Graphics Content icons indicates that the content is out of date; that is, the version on the file system is newer than the version displayed on your computer.*

Sharing content

Exporting content from InDesign

Exporting content from InDesign to InCopy establishes a link between the two applications. You export InDesign text frames, graphics frames, and their contents to InCopy using either of two methods:

- Create a container file (*.icma)—called an *assignment*—and add related groupings of document items (such as the text and graphics of a story) to the assignment so they can be worked on together. (Assignments compatible with InDesign CS3 are saved as *.inca files.) Content within assignments is exported as *.icml files. (Content exported for InCopy CS3 is saved as *.incx files.)
- Export text and graphics frames separately (including placeholder frames) using the Edit > InCopy > Export menu commands. Exported content is saved as *.icml files. (Content exported for InCopy CS3 is saved as *.incx files.)

After content is exported, small icons appear at the top left of exported frames in InDesign and InCopy, and in the Assignments panel. A link to the exported file appears in the Links panel. These icons indicate the status of managed frames and they differentiate managed frames from those that aren't part of the workflow. All exported content appears in the Assignments panel. Content exported using the Export menu commands appears in the Unassigned InCopy Content section of the Assignments panel list. While both methods establish a controlled connection between InCopy content and an InDesign document, the primary method is to use assignment files.

Exporting content makes the content available for users to check out while maintaining a link to the original InDesign document. (This link is made from within InDesign; you cannot create the link from InCopy.)

Once the content is exported, InCopy users can see (but not change) the page layouts, styles, and so forth as they appear in the InDesign document.

Note: *You can also create text or anchored graphics using InCopy and then place them in InDesign.*

See also

"Assignment files" on page 74

"Assignments panel overview" on page 73

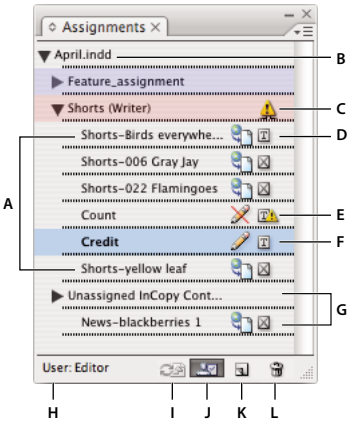
"Workflow icons" on page 72

"Placing InCopy files in InDesign documents" on page 88

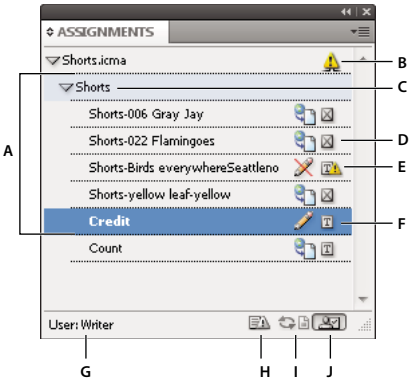
Assignments panel overview

The primary tool for working with assignments is the Assignments panel (Window > Assignments). The Assignments panel displays the files exported from the currently active InDesign document, and an icon indicates their status. The Assignments panel menu also contains commands that control import version and file-management functions between InCopy and InDesign. When you open an assignment in InCopy, the assignment name and its contents appear in the Assignments panel. You can double-click text and graphics frames in the Assignments panel to select them in the document window.

Note: *All content exported to InCopy or added to an assignment is also listed in the Links panel. Although you can do some workflow management tasks, such as checking out and checking in content, the recommended panel for these tasks is the Assignments panel.*



InDesign Assignments panel
A. *InCopy content names* ***B.*** *InDesign document name* ***C.*** *Assignment Out Of Date status* ***D.*** *Available And Text Up To Date status* ***E.*** *In Use And Text Out Of Date status* ***F.*** *Editing And Text Up To Date status* ***G.*** *Unassigned content* ***H.*** *User name* ***I.*** *Update Content button* ***J.*** *Check Out/Check In Selection button* ***K.*** *New Assignment button* ***L.*** *Delete Selected Assignments/Remove button*



InCopy Assignments panel
A. *InCopy content names* ***B.*** *Assignment Out Of Date status* ***C.*** *Assignment name* ***D.*** *Available And Text Up To Date status* ***E.*** *In Use And Text Out Of Date status* ***F.*** *Editing And Text Up To Date status* ***G.*** *User name* ***H.*** *Update Design button* ***I.*** *Update Content button* ***J.*** *Check Out/Check In Selection button*

See also

"Exporting content from InDesign" on page 73

"Assignment files" on page 74

Assignment files

In InDesign, assignment files are containers for organizing collections of page items. For example, you might want to select all the items in a story (headline, byline, copy, graphics, and captions), and then assign them to one InCopy user. Adding those items to an assignment provides a convenient way for InCopy users to access only the content for which they are responsible. Assignment files (*.icma) appear in the file system, in the InCopy story bar, and in status messages. Only InDesign users can create assignment files; only InCopy users can open them.

When you create an assignment, a folder is created in the same location as the InDesign document by default. This assignment folder includes the *.icma assignment files and a content subfolder that contains any exported InCopy story files (in .icml format) that are part of images or other resources. Once the assignment is created, store the project folder in a location where all users have access to it, or create and distribute an assignment package. If content is exported before it's added to an assignment, the files on disk are not moved to the content folder of the assignment file.

Assignment files include the following:

- Links or pointers to the associated page items, including placeholder frames. These elements let the InCopy user open a single file in InCopy and have editorial access to multiple page items.
- Any transformations on the graphics included in the assignment, such as moving, scaling, rotating, or shearing.
- Page geometry, so InCopy users can see the layout of the frame and its content that they're editing without opening the entire InDesign file.
- Color-coding of assigned frames in the document.

Illustration of page in InCopy showing page geometry and color coding

Create assignments and add content (InDesign)

Only InDesign users can create assignments and add content to them. There are several ways to create assignments. The method you choose usually depends on whether you have content to add at the time you create the assignment.

- Create empty assignment files. From your InDesign document, you can create a series of empty assignments to act as templates for content to come later.
- Create assignments and add content at the same time.
- Add content to an existing assignment file. You can add linked content—text and graphics that have already been exported as InCopy content—or you can add selected page items to become linked InCopy content. If one or more of the selected frames already contain InCopy content files, and none is part of an assignment, you can add them to a new or existing assignment file.

By default, the assignment folder you create is saved in the same folder as the InDesign document. You can then place this folder on a server or create and send a package.

Note: *If you don't want InCopy users to place and fit graphics, don't add graphics frames to an assignment.*

See also

"Relink missing assignment files (InDesign)" on page 87

"Best practices for working with managed files" on page 69

Create empty assignment files (InDesign)

1 In InDesign, save the document.

2 In the Assignments panel (Window > Assignments), choose New Assignment from the panel menu.

3 In the New Assignment dialog box, specify assignment file options and click OK.

Simultaneously create assignments and add content (InDesign)

1 In InDesign, create a document that has one or more text frames, graphics frames, or placeholder items, and then save the document.

2 Select the text and graphics frames you want to add.

3 Do one of the following:

- From the Assignments panel menu, choose Add To Assignment, and then select New.
- Choose Edit > InCopy > Add *[option]* To Assignment > New.

4 In the New Assignment dialog box, specify assignment file options and click OK.

The newly created assignment file includes any frames selected in the document window.

Add content to existing assignments (InDesign)

1 Save the InDesign document.

2 Select the text and graphics frames you want to add.

3 Do one of the following:

- From the Assignments panel menu, choose Add To Assignment, and then select the assignment.
- Drag content from the Unassigned InCopy Content section of the Assignments panel into an existing assignment.
- Select page items with the Selection tool and drag them to an existing Assignment in the Assignments panel.
- Choose Edit > InCopy > Add *[option]* To Assignment, and then select the assignment.

4 Choose Update All Assignments from the Assignments panel menu to make the content files available to InCopy users.

Note: *You can add content only to assignments in the same document. However, you can import the same content into multiple documents and add it to an assignment in each of those documents.*

Assignment file options (InDesign)

When you create or modify an assignment file, you can set the following options:

Assignment Name The unique identification of the assignment in the Assignments panel, for example "Ocean article." This name must conform to the file naming conventions of the operating system.

Compatibility Choose Optimized For CS4 if the InCopy users in your workgroup are using InCopy CS4. Assignments are saved as *.icma files. Choose Compatible With CS3 to allow InCopy CS3 users to open the assignment.

Assigned To The unique identification of the user assigned to the files. The user's name appears in parentheses following the assignment name in the Assignments panel. Entering a name here is for informational purposes only; it doesn't grant special rights or permissions to the user.

Color Displays a list of colors for adding a distinctive highlight to the frames of the current assignment in the document window, and to the assignment names in the Assignments panel. This color coding differentiates frames that belong to one assignment from frames that belong to another, and it differentiates from unassigned frames. To toggle the display of this color coding, choose View > Show/Hide Assigned Frames. In InCopy, the color coding is visible only in Layout view.

Note: *If toggling the display of assigned frames produces unexpected results, those frames might be tagged for XML and View > Structure > Show Tagged Frames might be enabled. You cannot show assigned frames and tagged frames at the same time.*

Change Click the Change button to specify the location of the assignments folder. By default, the assignments folder is created in the same location as the InDesign file.

Placeholder Frames Lets InCopy users see the text and graphics frames in the assignment as well as boxes (or other shapes) representing all other frames on those InDesign pages. All frames and placeholders accurately reflect the size, shape, and location of the InDesign originals. Placeholder frames are empty shapes that don't show any of the content in the InDesign document. The Placeholder Frames option provides the least amount of fidelity, and therefore provides the fastest performance. In InCopy, the placeholder frames are visible only in Layout view. InCopy users cannot check out and edit placeholder frames.

Assigned Spreads Lets InCopy users see all assigned frames, as well as the entire contents of other frames that aren't part of the assignment, on the same spread. In InCopy, content in frames outside an assignment isn't editable and is visible only in Layout view.

All Spreads Exports all content in the InDesign document to the assignment file. This option provides the maximum amount of fidelity; it also provides the slowest performance because the assignment file displays the design and layout of every page, including pages not relevant to the section a user is editing.

Linked Image Files When Packaging Includes a copy of linked images in the assignment package. Selecting this option gives InCopy users access to images but increases the package's file size. InCopy users can include images while returning a package.

Export content as separate InCopy files (InDesign)

If your workgroup prefers working with separate files rather than using assignments, you can export InCopy content without using an assignments file. Compared with creating a single assignment file with references to multiple content files and layout information, this method creates a separate file (.icml) for each text or graphics frame you specify in the document. To see the context of the content you are editing, you must also open the associated InDesign document (.indd).

Cater the InDesign document to suit your workflow needs. For example, if you want all of the editor's comments to be exported in a single file, create a layer for the editor to make comments. You can then export all the content on the selected layer.

Note: *A quick way to export content as separate InCopy files is to use the Selection tool to drag selected frames into the Unassigned InCopy Content in the Assignments panel.*

1 In InDesign, create a document with one or more text frames, graphics frames, or placeholder items.

2 Do either of the following:

- Select the text or graphics frame of a single story, or Shift-click to select multiple frames.
- Click an insertion point in a story, or select some text in a text frame.

3 Choose Edit > InCopy > Export, and then choose one of the following options:

Selection Exports all selected text and graphics frames.

Layer Exports all content on the selected layer.

All Stories Exports every story that has not been exported already.

All Graphics Exports every graphic that has not been exported already.

All Graphics And Stories Exports every story and graphic that has not been exported already.

If you export all content in the document, and then add more text or graphics frames to the same document, you can save time exporting the new ones by using the Export > All Stories (or All Graphics or All Graphics And Stories) command again. InDesign exports only the new content.

4 (Optional) In the Export InCopy Content dialog box, choose InCopy CS3 Interchange from the Save As Type (Windows) or Format (Mac OS) menu to make the exported file compatible with InCopy CS3. This saves the content as an .incx file rather than an .icml file.

5 Enter a name and location for the files, and then click Save.

The file name you specify is used as a prefix for identifying each exported content file in the file system. If you export multiple text frames, the first several characters of the text are automatically appended to the file name; for example, "mystory-Upcoming cycling events.icml." For multiple graphics frames, the file names are formed as "mystory-graphic," "mystory-graphic-1," and so on. The file name appears in the file system, in the InCopy story bar, and in status messages.

6 When prompted, save your InDesign file.

The InCopy content is now managed, and is available to be checked out and edited by other users in the workflow.

Shared content appears in the Links panel just like imported graphics. If you move a shared file manually, you can use the Links panel to update its link.

When you export content, you see the Available icon on the text frame (InDesign and InCopy), and in the Assignments panel (InCopy). The word [Available] appears in the story bar (InCopy).

Assignment packages

Create and send packages (InDesign)

Under ideal circumstances, all InDesign and InCopy users on the team have access to a server where assignment files are stored. However, if one or more users don't have access to a common server, you can create and distribute compressed assignment packages. After working on the assignment, the InCopy user repackages the assignment and returns it to be integrated into the InDesign document. Package files created in InDesign include the .icap extension (or .incp if the assignment is compatible with CS3). The return package files created in InCopy include the .idap extension (or .indp if the assignment is compatible with CS3).

There are two commands for packaging files: Package and Package And Email. Use Package to create a compressed package that you can distribute manually; use Package And Email to create a compressed package that is attached automatically to an e-mail message.

Create a package for manual distribution

1 Create an assignment and add the content you want to include in the package.

Only content that is checked in can be included in the packaged assignment. If any content is checked out, you're prompted to check in content.

2 In the Assignments panel, select the assignment and choose Package For InCopy from the panel menu.

3 Specify a name and location for the package file, and click Save.

You can attach the package file to an e-mail message, upload it to an FTP server, or copy it to a disk or other external media.

Note: *Choosing Edit > Undo after you create a package cancels the package and unlocks the items in the assignment, but it doesn't delete the package file from your computer or unsend the e-mail.*

Create a package for e-mail (InDesign)

1 Create an assignment and add the content you want to include in the package.

Only content that is checked in is included in the packaged assignment. If any content is checked out, you're prompted to check in content.

2 In the Assignments panel, select the assignment and choose Package For InCopy And Email from the panel menu.

A compressed assignment package is created and attached to an e-mail message of your default e-mail application.

Note: *If you want to use a different e-mail application, change the default e-mail application. See your system documentation for details.*

3 Edit the e-mail message by adding a recipient and providing any instructions. Send the message.

All items in the assignment are checked out to the assigned user. However, the contents of the package itself aren't locked, so anyone can open the package and edit them.

Cancel a package

In some cases, the package you send isn't returned. For example, the message may have gotten lost, or the recipient may no longer work on the project. In such a situation, you can cancel a package.

1 In the Assignments panel, select the packaged assignment, and choose Cancel Package from the panel menu.

2 Click OK to cancel the package.

Canceling a package doesn't remove the package file from your computer.

When a package is cancelled, the package's contents are available for editing. Be aware that if someone returns a package that has been cancelled, conflicts may occur.

Update a package

After you create a package, you may want to add, remove, or resize items.

1 Add, remove, or resize one or more stories to the packaged assignment.

2 Do one of the following:

- Choose Update Package from the Assignments panel menu. Specify the name and location of the file. Make the updated package available to users by placing it on a shared server or by e-mail. Remember to notify InCopy users that the package has been updated.
- Choose Update Package And Email from the Assignments panel menu, and then send the message.

When InCopy users open the updated package, only new content is added automatically to the assignment; InCopy users can decide whether to overwrite existing content, allowing them to preserve previous edits.

Receive packages (InCopy)

You may receive a package from an InDesign user who created the package or from an InCopy user who forwarded the package to you. When you open an assignment package, the package is decompressed, and the contents are copied to a new subfolder in an InCopy Assignments folder.

See also

"Check in content" on page 85

"Save changes (InCopy)" on page 86

Open a package (InCopy)

❖ To open an InCopy package (*.icap or *.incp), do any of the following:

- Launch the package using the e-mail application. For example, double-click the attachment file.
- Use Explorer or Finder to open the file. For example, double-click the file or drag it to the InCopy application icon.
- In InCopy, choose File > Open, and double-click the packaged assignment file.
- In InCopy, choose Open Package from the Assignments panel menu, and then double-click the package file.

You can now edit the stories in the package. When you begin editing a story, you're prompted to check out the contents of the frame. When you've finished editing, save all content and return or forward the package.

Return or forward a package (InCopy)

After you open and edit a package, you can send it to another InCopy user or you can return it to the InDesign user who created the package. Package files created for other InCopy users include the .icap extension; return package files created for InDesign users include the .idap extension.

1 Edit and check in the content you want to include in the package.

2 From the Assignments panel menu, choose one of the following:

Forward For InCopy Create a package for another InCopy user. Specify the name and location of the package file, and then make it available to the InCopy user.

Forward For InCopy And Email Create and send a package for another InCopy user via e-mail. The package appears as an attachment in a new message in your default e-mail application. Specify the recipient, provide instructions, and send the e-mail message.

Return For InDesign Create a package to return to the InDesign user.

Return For InDesign And Email Create and return a package to the InDesign user by e-mail. The package appears as an attachment in a new message in your default e-mail application. Specify the recipient, provide instructions, and send the e-mail message.

Receive return packages (InDesign)

❖ To open an InDesign package (*.idap or *.indp), do any of the following:

- Launch the package using the e-mail application. For example, double-click the attachment file.
- Use Explorer or Finder to open the file. For example, double-click the file or drag it to the InDesign application icon.
- In InDesign, choose File > Open, and double-click the package file.
- In InDesign, choose Open Package from the Assignments panel menu, and then double-click the package file.

You're prompted to update all links when opening the package. If a story has been modified since the assignment was packaged, you can determine whether to update or unlink the content in the InDesign file. When the stories in the files are returned and checked in, you can check out and edit the content.

See also

"Update assignment files (InDesign)" on page 82

"Unlink content files (InDesign)" on page 88

Working with managed files

Open shared content

Only InCopy users can open assignment files (.inca). If an InCopy user opens an InDesign file that contains assignments, the user will have access to all the managed content, regardless of assignments.

❖ Do one of the following.

- In InCopy, choose File > Open, select an assignment file (.icma or .inca), and click Open.
- In InDesign or InCopy, choose File > Open, select an InDesign file (.indd) that contains assigned content, and click Open.
- Open an assignment package. See "Receive packages (InCopy)" on page 79.

The assignment names and their contents appear in the Assignments panel.

See also

"Assignment files" on page 74

"Managed files" on page 69

Check out content

When you check out an item, a hidden lock file (.idlk) is placed on the file system. Once the content is checked out, you have exclusive control over its content, and others are locked out from making changes. You can check out InCopy content only; you cannot check out InDesign documents with layout information.

If you attempt to close an InDesign document containing one or more InCopy content files that are checked out to you, an alert message appears, prompting you to check in all content. If you close the document without checking in the content files, they will still be checked out to you the next time you open the InDesign document. Saving the InDesign document automatically saves every editable InCopy content file.

See also

"Managed files" on page 69

Check out content (InDesign)

❖ Do one of the following:

- In the layout, select the text or graphics frames to edit and choose Edit > InCopy > Check Out.
- In the Assignments panel, select the files and choose Check Out from the panel menu.

When you check out available content in InDesign, you see the Editing icon on the InDesign frame. In InCopy, the In Use icon appears on the InCopy frame and in the Assignments panel if the assignment files are stored on a local server.

Check out content (InCopy)

1 Do one of the following:

- If the content you want is part of an assignment, choose File > Open and select the assignment file (.icma or .inca).
- If the content you want was exported as individual files, choose File > Open and select the InCopy file (.icml or .incx). To see the layout so you can do copyfitting, select the InDesign document.

2 Do one of the following:

- To check out a single InCopy content file, choose File > Check Out.
- To check out all content in an assignment at once, select the assignment in the Assignments panel, and choose Check Out from the panel menu.
- To check out individual items in an assignment, open the assignments list in the Assignments panel, select an item or multiple items, and choose Check Out from the panel menu.

The Editing icon appears next to the item or items in the Assignments panel, indicating that the content is checked out to you for your exclusive use.

3 If prompted to update the content with changes, click OK.

When you check out available content in InCopy, you see the Editing icon on the InCopy frame, and in the Assignments panel. In InDesign, the In Use icon appears on the InDesign frame.

Opening managed files (InCopy)

Opening a managed content file (.icml or .incx) directly in InCopy and working with it in Story view may be more appropriate for quick writing and editing. You do not have to check out an individual managed file to edit it; InCopy automatically checks it out. When you save and close the file, InCopy automatically checks in the content. The Save commands are different when you open individual files.

See also

"Managed files" on page 69

"Save changes (InDesign)" on page 85

Update assignment files (InDesign)

You can save changes to assignments manually or when you close the current document. Updating an assignment file is the only way to make layout changes available to InCopy users.

❖ Do one of the following:

- To update selected assignments, select them in the Assignments panel and choose Update Selected Assignments from the Assignments panel menu.
- To update all out-of-date assignments in the current document, choose Update Out-Of-Date Assignments from the Assignments panel menu. Only assignments that are out of date are updated.
- To update all assignments in the current document, choose Update All Assignments from the Assignments panel menu.

Note: *If an InCopy user has an assignment open when you update the assignment, the Out Of Date icon appears next to the assignment in the InCopy Assignments panel.*

See also

"Update content" on page 83

"Create and send packages (InDesign)" on page 78

Update content

To make sure that you're always working on the most up-to-date content, be sure to watch for Out Of Date icons in the Assignments panel, and then update content accordingly. Updating an InCopy assignment file and its contents or updating individual content files copies data from the latest file system copy so that the version displayed on your computer matches the one on the file system. Updating does not require checking in or out and does not give you editing rights. However, updating can cause problems if another user has deleted your lock.

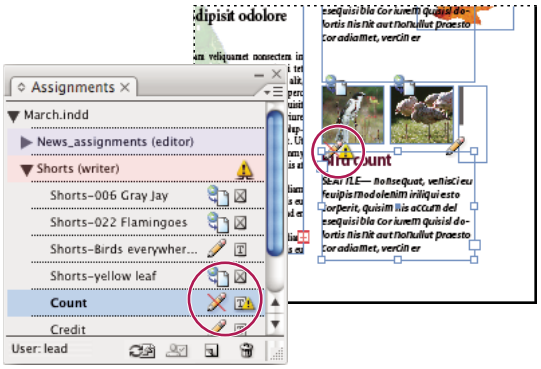
Note: *Updating content does not update content in assignment packages that have not been returned.*

A typical updating workflow is as follows:

1 The InCopy user opens an assignment file or checks out an individual content file and edits the content.

2 The InCopy user saves the content file, which updates the copy on the file system, and continues working.

3 The InDesign user sees the Out Of Date icon in both the Assignments panel and the Links panel next to the selection, and the In Use and Text Content Out Of Date icon or Graphics Content Out Of Date icon on the associated frame.



Assignments panel with In Use and Out Of Date icons (left) and Layout with out-of-date content (right)

4 The InDesign user updates the content.

See also

"Accidentally updating your work" on page 84

"Links panel overview" on page 52

Update content while opening a managed document (InDesign)

1 Choose File > Open, locate the file you want to open, and click Open.

2 Click Yes when prompted to update the document with the modified content on the file system.

3 Do one of the following:

- To let InDesign update the links, click Fix Links Automatically.
- To fix links manually, click Don't Fix, and then, in the Links panel, select the file to update and choose Update Link from the panel menu.

Update content while working (InDesign)

❖ Do one of the following:

- Select the text or graphics frames in the layout and choose Edit > InCopy > Update Content.

- Select the text or graphics frames in the Links panel, and click the Update Link button or choose Update Link from the Assignments panel menu.

Update content while working (InCopy)

❖ Do one of the following:

- Click an insertion point in the text frame to select it, and then choose File > Update Content.
- Select the content in the Assignments panel, and then click the Update Content button or choose Update Content from the Assignments panel menu.

You can also update content using the Links panel.

Accidentally updating your work

In most cases, the update commands are disabled for content you have checked out, because that content would always be up to date. However, an undesirable situation can occur if a different user deletes the lock on checked-out content (by dragging the lock file [.idlk] to the Recycle Bin [Windows] or Trash [Mac OS]), and modifies the content. In this case, the update commands can become enabled even while the content is checked out to you, essentially allowing two people to edit the content at the same time. Updating the content results in lost work. For best results, do not delete the lock files.

Update the InDesign layout

InDesign users can modify the layout (for example, change the size or location of the text frames of a story) and save the changes while InCopy users are modifying the text of these text frames. In a shared server workflow, the way InCopy users are notified about layout changes depends on whether they have opened an assignment file or have checked out individual content files and also opened the linked InDesign file.

Consider the following:

- If an InDesign user changes the layout of frames in an assignment, the user must update the assignment to make the design changes available to InCopy users. InDesign does not automatically update assignment files when the document is saved.
- Once the InDesign user updates the assignment stored on a shared server, the Out Of Date icon appears next to the assignment in the InCopy Assignments panel. The InCopy user must update the design to see the current layout.
- If an InDesign user changes the layout of exported content that is not part of an assignment, the Out Of Date icon appears next to the InDesign document name in the Assignments panel, and the document title bar indicates the layout is out-of-date. InCopy users can update the currently active InDesign document with the latest layout and style changes.

Updating the layout in InCopy is useful for copyfitting tasks, because the latest appearance and line breaks are visible in Layout and Galley views.

❖ Do one of the following:

- If you have an assignment file open and the Assignments panel shows the Out Of Date icon next to the assignment name, click the Update Design button, or choose File > Update Design. You cannot undo this command.
- If you are not working with assignment files and you have more than one InDesign document open, select the one you want to make active, and choose File > Update Design.

Check in content

When you check in a managed content file, you save it to a shared location on a file system where it can be checked out by others for editing or other changes. Exporting a text or graphics frame from InDesign also checks it in automatically.

Although a checked-in file is available for editing, it is not actually editable until it is checked out (unless you edit the content in stand-alone mode in InCopy). Checking in content relinquishes editing control, but does not close the file. The content remains open on your screen, but in a read-only state.

The LiveEdit Workflow plug-ins do not create multiple file versions. Instead, files are overwritten when updated in either InCopy or InDesign. (To gain file-versioning capabilities, as well as many other features, use Adobe Version Cue in InDesign or InCopy with a Version Cue Workspace.)

If you are working on an assignment package, return or forward the assignment package after checking it in.

See also

"Exporting content from InDesign" on page 73

"Work with stand-alone documents" on page 34

"Managed files" on page 69

Check in managed content (InDesign)

❖ Do one of the following:

- Select the content in the layout and choose Edit > InCopy > Check In.
- In the Assignments panel, select the content and choose Check In from the panel menu.

Check in managed content (InCopy)

❖ Do one of the following:

- Select the content in Layout view and choose File > Check In.
- In the Assignments panel, select the content and choose Check In from the panel menu.

Note: *You can undo the most recent changes before you check in content.*

When you check in a file, the Available icon appears on the text or graphics frame in the InDesign layout, in the InCopy Layout view, in the Assignments panel, and in the story bar (InCopy).

Save changes (InDesign)

As you work on content you have checked out, you can save your changes and update the file-system copy.

❖ Do one of the following:

- To save the selected content without saving changes to the InDesign document or any of its linked files, select the content in the layout and choose Edit > InCopy > Save Content.
- To save every content file checked out to you, choose File > Save. This type of save does not automatically update assignment files or checked-out content files in InCopy. However, the checked-out files in InCopy will show the Out Of Date icon in the Assignments panel.
- To save the InDesign document under a new name with links to any existing InCopy files, choose File > Save As. This action causes the assignments in the InDesign file to appear as missing until they are updated.

- To save a copy of the currently active document, choose File > Save A Copy. You can choose to give the copy a new name and location with links to any existing InCopy files.

Note: *If you are working with a file managed by a Version Cue Workspace, a separate Check In command is available. The Version Cue Workspace feature is available as part of the Adobe Creative Suite.*

See also

"Update content" on page 83

Save changes (InCopy)

❖ Do one of the following:

- To save the InCopy file under the same name and location on the file system, choose File > Save Content. The file is still checked out to you.
- To save the InCopy content file under a new name, choose File > Save Content As. The newly created content file is not managed in the workflow. The Save Content As command is available only if you have opened the InCopy content file (.icml or .incx) directly.
- To save a copy of the currently active InCopy content file, choose File > Save Content Copy. You can choose to give the copy a new name and location. The saved copy is not managed in the workflow. The Save Content Copy command is available only if you have opened the InCopy content file (.icml or .incx) directly.
- To save all currently open and checked-out InCopy content files, choose File > Save All Content. This saves all files to their current locations. The Save All Content command is available only if you have opened an assignment or InDesign file.

Note: *The Save A Version command is available only if you are working with a file managed by a Version Cue Workspace. The Version Cue Workspace feature is available as part of Adobe Creative Suite.*

Adjusting your workflow

Move content between assignments (InDesign)

InDesign users can move content between existing assignments as well as from the Unassigned InCopy Content section of the Assignments panel. You can also create a new assignment and move content to it.

1. Save the InDesign document.
2. In the Assignments panel, click the arrow to the left of the assignment name to display the contents of the assignment.
3. Select an item in an assignment.
4. Do one of the following:

- Drag the content from one assignment to another.
- To move content to an existing assignment, choose Add To Assignment from the Assignments panel menu, and then select the desired assignment.
- To create a new assignment as you move content, from the Assignments panel menu, choose Add To Assignment > New, and then specify options in the New Assignment dialog box.

5. Choose Update All Assignments from the Assignments panel menu.

If the assignment lists are short, you might prefer dragging content items to and from assignments and the Unassigned InCopy Content section.

See also

"Unlink content files (InDesign)" on page 88

Delete assignments (InDesign)

❖ In the Assignments panel, select one or more assignments and choose Delete Assignment in the panel menu.

Deleting assignments accomplishes the following:

- Removes the assignment data from the document.
- Deletes the assignment file from the file system.
- Removes the assignment name from the list.
- Moves any InCopy content to the Unassigned InCopy Content section in the Assignments panel.

Note: *If an InCopy user has an assignment open when it is deleted in InDesign, an alert message notifies the InCopy user that the assignment has been deleted. However, the content files are not deleted and can be updated without loss of changes.*

See also

"Unlink content files (InDesign)" on page 88

Relink missing assignment files (InDesign)

If you move or delete an assignment file from disk, and then open the InDesign document from which it was created, InDesign won't know where the assignment file is located. You need to re-create the assignment file so InDesign can find it.

See also

"Update, restore, and replace links" on page 54

Re-create the assignment file in the original location

❖ In the Assignments panel, do one of the following:

- Select the missing assignment (it will still be listed in the panel) and choose Update Selected Assignments from the panel menu.
- Choose Update All Assignments from the panel menu.

Change the assignment location

❖ To re-create the assignment file in a new location, do one of the following in the Assignments panel:

- Select the assignment and choose Change Assignment Location from the panel menu. Specify a location and name for the new file.
- Double-click the assignment name. In the Assignment Options dialog box, click Change and specify a location and name for the new file.

Correct mistakes

If you make a mistake, you can discard changes made since the last Save command and restore the content from the file system.

Because InDesign automatically saves every editable InCopy content file when you save the InDesign document, the Cancel Checkout command restores only versions since the last time the document was changed.

❖ Do one of the following:

- To undo the most recent change, choose Edit > Undo *[action]*.
- To undo all changes made since the last time you saved the document, choose File > Revert Content.
- To undo changes since the last saved version and remove the lock file, select the content in the Assignments panel and choose Cancel Check Out from the panel menu. This action makes the content read-only and available for others to check out.

Overriding locked files (InDesign)

Users might not immediately realize how their actions affect others in the workflow, and might accidentally create situations where conflicts exist between content status and ownership. If necessary, the InDesign user can resolve conflicts by unlinking a locked file checked out to a different user and taking control over the file. Unlinking a file stores the content in the InDesign document, but the content is no longer shared with InCopy.

See also

"Unlink content files (InDesign)" on page 88

"Accidentally updating your work" on page 84

Unlink content files (InDesign)

If necessary (because of a production deadline, for example), InDesign users can remove a content file from the managed workflow and from the Links panel by *unlinking* it. If you want to make the content available again for editing, you must reexport it as InCopy content using a different file name. This ensures that the old lock file won't prevent users from editing the file.

Note: *Unlinking your own checked-out file removes it from the workflow and deletes the lock file from disk. You can re-export the content and overwrite the file name without conflict.*

❖ To unlink an InCopy content file, select the file (.icml or .incx extension) in the Links panel and choose Unlink from the panel menu. Unlinking embeds the content into the document and removes the link to the InCopy file on disk.

To relink the file, choose Edit > Undo Unlink.

You can also unlink by deleting a frame, or using the InDesign Links panel to relink a content file to another file. You can also select the story in the Assignments panel and drag it to the Trash icon.

Placing InCopy files in InDesign documents

Although a typical workflow begins in InDesign, where the basic layout and text and graphics placeholders are defined and exported to InCopy, a different workflow can start with a stand-alone InCopy content file (.icml or .incx) that you place in InDesign using the File > Place command.

Consider the following dependencies when you place InCopy content files in an InDesign document:

Styles If the InCopy text file has styles applied, they are added to the InDesign list of styles for the document. In the event of a style-name conflict, InDesign overwrites the imported style with its existing style.

Layout You can create the basic layout geometry for the content in InDesign, and then create or import the text and styles from a word-processing application. (Text files placed within InCopy are embedded in the InCopy document and are not linked to any external file.)

Placing/Duplicating If you place an InCopy content file more than once, each instance of the content appears in the InDesign Links panel, but they are all managed as one content file. The same is true for any exact copies of a content file (by any means of duplication).

Note: *If you copy and paste some, but not all, of the text in a managed InCopy content file, the result is a new content file that is not connected to the original and has no link to any external file (InCopy or otherwise). The original and the pasted portions can be edited independently of each other.*

Updates/Management Once multiple instances of a managed content file are present in an InDesign document, they behave as if they were open in two applications. For example, checking out one instance of the content file locks all other instances so that you can edit only the checked-out instance. In this case, you would use the appropriate Update command to refresh the other (open) instances of the content.

Chapter 5: Text

Adobe® InCopy® gives you the tools you need to add text to stories with both flexibility and precision.

Adding text

Adding text

You can add text by typing, pasting, or importing text from another file. In general, you use standard word-processing techniques to work with text in InCopy. Select the Type tool T on the toolbox, and then use the techniques described below. These methods work the same way in Galley, Story, and Layout views, whether or not the content is linked to Adobe InDesign®.

Note: *You can track changes so that added text is highlighted in Galley and Story views. (See "Tracking and reviewing changes" on page 130.)*

Typing Click the insertion point where you want to add text, and begin typing.

Selecting Drag, double-click, or triple-click to select individual characters, words, lines, or paragraphs (depending on the Preferences settings). Or click anywhere in the content, and choose Edit > Select All.

Pasting Copy or cut text, click at the location you want, and choose Edit > Paste. If you want to remove the formatting of the pasted text, choose Edit > Paste Without Formatting. If you want to add or remove spacing as necessary, select Adjust Spacing Automatically When Cutting And Pasting Words in the Type section of the Preferences dialog box.

Deleting Select the text you want to delete, and choose Edit > Clear.

You can also import text directly from another text document.

Importing files

You can import text from other InCopy stories, Microsoft® Word, Microsoft Excel, and any application that can export text in Rich Text Format (RTF) or text-only format. All importable file formats are listed in the InCopy Place dialog box (in the Files Of Type menu for Windows®, and in the right list pane for Mac OS).

Document formatting and styles

You can import files with or without formatting. If you import the files with formatting, InCopy imports most character and paragraph formatting attributes from text files, but ignores most page-layout information, such as page breaks, margins, and column settings (which you can set in InDesign). In general, InCopy imports all formatting information specified in the word-processing application, except for features not available in InCopy.

If InCopy has an import filter for an application, you can determine which styles are imported, and which formatting to use if there is a name conflict.

Note: *InDesign controls the styles in linked InCopy stories. When you place an InCopy story in InDesign, any imported styles in the InCopy document are overridden in InDesign if there are conflicting style names.*

Saving files for import

If your word-processing application can save files in more than one file format, try using the format capable of retaining the most formatting—either the application's native file format or an interchange format such as Rich Text Format (RTF).

You can import files created in the recent versions of Microsoft Word. If you are placing a file from a different word-processing application or from Word 95 for Windows or earlier, such as Word 6, open the file in its original application and save it in a compatible Word format or in RTF, which preserves most formatting.

See also

"Import graphics" on page 46

Place (import) text

For large amounts of text, the Place command is the most useful way to import content. InCopy supports a variety of word-processing, spreadsheet, and text file formats. The degree to which the original formatting is preserved depends on the import filter for the file type and the options you choose as you place the file. You can also open Word, text, and RTF files directly in InCopy.

1. Using the Type tool T, click where you want the text to appear.
2. Choose File > Place.
3. In the Place dialog box, select Show Import Options if you want to display a dialog box containing import options for the type of file you're placing.
4. Select the text file you want to place, and then click Open. (If you Shift-click Open, the Import Options dialog box appears, even if Show Import Options isn't selected.)
5. Do any of the following:

- If a dialog box displays import options for the type of file you're placing, select any options you want, and click OK.
- If the document you're importing contains fonts that aren't available on your system, a dialog box opens to inform you of the font substitution. If you prefer to specify other substitution fonts, click Find Font and choose alternatives.

If the text you import into your document includes pink, green, or another color of highlighting, you likely have one or more composition preference options turned on. Open the Composition section of the Preferences dialog box, and notice which options are turned on under Highlight. For example, if the placed text is formatted with fonts not available in InCopy, the text is highlighted in pink.

See also

"Work with stand-alone documents" on page 34

Import options

When you import Word, Excel, and tagged text files, you can determine how the files are imported.

Microsoft Word and RTF import options

If you select Show Import Options when placing a Word file or an RTF file, you can choose from these options:

Table Of Contents Text Imports the table of contents as part of the text in the story. These entries are imported as text only.

Index Text Imports the index as part of the text in the story. These entries are imported as text only.

Footnotes Imports Word footnotes. Footnotes and references are preserved, but renumbered based on the document's footnote settings. If the Word footnotes are not imported properly, try saving the Word document in RTF format and importing the RTF file.

Endnotes Imports endnotes as part of the text at the end of the story.

Use Typographer's Quotes Ensures that imported text includes left and right quotation marks (“ ”) and apostrophes (’) instead of straight quotation marks (" ") and apostrophes (').

Remove Styles And Formatting From Text And Tables Removes formatting, such as typeface, type color, and type style, from the imported text, including text in tables. Paragraph styles and inline graphics aren't imported if this option is selected.

Preserve Local Overrides When you choose to remove styles and formatting from text and tables, you can select Preserve Local Overrides to maintain character formatting, such as bold and italics, that is applied to part of a paragraph. Deselect this option to remove all formatting.

Convert Tables To When you choose to remove styles and formatting from text and tables, you can convert tables to either basic, unformatted tables or unformatted, tab-delimited text.

If you want to import unformatted text and formatted tables, import the text without formatting, and then paste the tables from Word into InCopy .

Preserve Styles And Formatting From Text And Tables Preserves the Word document's formatting in the InDesign or InCopy document. You can use the other options in the Formatting section to determine how styles and formatting are preserved.

Manual Page Breaks Determines how page breaks from the Word file are formatted in InDesign or InCopy. Select Preserve Page Breaks to use the same page breaks used in Word, or select Convert To Column Breaks or No Breaks.

Import Inline Graphics Preserves inline graphics from the Word document in InCopy .

Import Unused Styles Imports all styles from the Word document, even if the styles aren't applied to text.

Convert Bullets & Numbers To Text Imports bullets and numbers as actual characters, preserving the look of the paragraph. However, in numbered lists, the numbers are not automatically updated when the list items are changed.

Track Changes For InCopy Selecting this option causes highlighting and strikeout to appear when you edit the imported text in InCopy while Track Changes is turned on; deselecting this option causes all the imported text to be highlighted as a single addition. Track Changes can be viewed in InCopy, not in InDesign.

Import Styles Automatically Imports styles from the Word document into the InDesign or InCopy document. If a yellow warning triangle appears next to Style Name Conflicts, then one or more paragraph or character styles from the Word document have the same name as an InCopy style.

To determine how these style name conflicts are resolved, select an option from the Paragraph Style Conflicts and Character Style Conflicts menu. Choosing Use InCopy Style Definition causes the imported style text to be formatted based on the InCopy style. Choosing Redefine InCopy Style causes the imported style text to be formatted based on the Word style, and changes existing InCopy text formatted with the Word style. Choosing Auto Rename causes the imported Word styles to be renamed. For example, if InCopy and Word have a Subheading style, the imported Word style is renamed Subheading_wrd_1 when Auto Rename is selected.

Note: *InCopy converts paragraph and character styles but not bulleted and numbered list styles.*

Customize Style Import Lets you use the Style Mapping dialog box to select which InCopy style should be used for each Word style in the imported document.

Save Preset Stores the current Word Import Options for later reuse. Specify the import options, click Save Preset, type the name of the preset, and click OK. The next time you import a Word style, you can select the preset you created

from the Preset menu. Click Set As Default if you want the selected preset to be used as the default for future imports of Word documents.

Text-file import options

If you select Show Import Options when placing a text file, you can choose from these options:

Character Set Specifies the computer language character set, such as ANSI, Unicode UTF8, or Windows CE, that was used to create the text file. The default selection is the character set that corresponds to the default language and platform of InDesign or InCopy.

Platform Specifies whether the file was created in Windows or Mac OS.

Set Dictionary To Specifies the dictionary to be used by the imported text.

Extra Carriage Returns Specifies how extra paragraph returns are imported. Choose Remove At End Of Every Line or Remove Between Paragraphs.

Replace Replaces the specified number of spaces with a tab.

Use Typographer's Quotes Ensures that imported text includes left and right quotation marks (“ ”) and apostrophes (’) instead of straight quotation marks (" ") and apostrophes (').

Microsoft Excel import options

You can choose from these options when importing an Excel file:

Sheet Specifies the worksheet you want to import.

View Specifies whether to import any stored custom or personal views, or to ignore the views.

Cell Range Specifies the range of cells, using a colon (:) to designate the range (such as A1:G15). If there are named ranges within the worksheet, these names appear in the Cell Range menu.

Import Hidden Cells Not Saved In View Includes any cells formatted as hidden cells in the Excel spreadsheet.

Table Specifies how the spreadsheet information appears in the document.

- **Formatted Table** InCopy tries to preserve the same formatting used in Excel, although the formatting of text within each cell may not be preserved. If the spreadsheet is linked rather than embedded, updating the link will override any formatting applied to the table in InCopy .
- **Unformatted Table** The table is imported without any formatting from the spreadsheet. When this option is selected, you can apply a table style to the imported table. If you format text using paragraph and characters styles, the formatting is preserved even if you update the link to the spreadsheet.
- **Unformatted Tabbed Text** The table is imported as tab-delimited text, which you can then convert to a table in InDesign or InCopy.
- **Formatted Only Once** InDesign preserves the same formatting used in Excel during the initial import. If the spreadsheet is linked rather than embedded, formatting changes made to the spreadsheet are ignored in the linked table when you update the link. This option isn't available in InCopy.

Table Style Applies the table style you specify to the imported document. This option is available only if Unformatted Table is selected.

Cell Alignment Specifies the cell alignment for the imported document.

Include Inline Graphics Preserves inline graphics from the Excel document in InCopy .

Number Of Decimal Places To Include Specifies the number of decimal places of spreadsheet figures.

Use Typographer's Quotes Ensures that imported text includes left and right quotation marks (“ ”) and apostrophes (’) instead of straight quotation marks (" ") and apostrophes (').

Tagged-text import options

You can import (or export) a text file capable of taking advantage of InCopy formatting capabilities by using the *tagged text* format. Tagged-text files are text files containing information describing the formatting you want InCopy to apply. Properly tagged text can describe almost anything that can appear in an InCopy story, including all paragraph-level attributes, character-level attributes, and special characters.

For information on specifying tags, view the Tagged Text PDF at www.adobe.com/go/learn_id_taggedtext_cs4_en (PDF).

The following options are available when you import a tagged-text file and select Show Import Options in the Place dialog box.

Use Typographer's Quotes Ensures that imported text includes left and right quotation marks (“ ”) and apostrophes (’) instead of straight quotation marks (" ") and apostrophes (').

Remove Text Formatting Removes formatting, such as typeface, type color, and type style, from the imported text.

Resolve Text Style Conflicts Using Specifies which character or paragraph style to apply when there is a conflict between the style in the tagged-text file and the style in the InDesign document. Select Publication Definition to use the definition that already exists for that style in the InDesign document. Select Tagged File Definition to use the style as defined in the tagged text. This option creates another style name, with “copy” appended to it in the Style panel.

Show List Of Problem Tags Before Place Displays a list of unrecognized tags. If a list appears, you can choose to cancel or continue the import. If you continue, the file may not look as expected.

Type Asian text using inline input

1 Choose Edit > Preferences > Advanced Type (Windows) or InCopy > Preferences > Advanced Type (Mac OS).

2 Select Use Inline Input For Non-Latin Text, and then click OK.

You can use a system input method, if available, for adding 2-byte and 4-byte characters. This method is especially useful for entering Asian characters.

Editing text

Select text

❖ Using the Type tool, do one of the following:

- Drag the I-bar cursor over a character, word, or an entire text block to select it.
- Double-click a word to select it. Spaces next to the word are not selected.
- Triple-click anywhere in a line to select a line. If the Triple Click To Select A Line preferences option is deselected, triple-clicking selects the entire paragraph.
- If the Triple Click To Select A Line option is selected, quadruple-click anywhere in a paragraph to select the entire paragraph.
- Quintuple-click to select the entire story, or click anywhere in a story and choose Edit > Select All.

Note: *If you select text that contains a note anchor, using any of the above procedures, the note and its contents are also selected.*

See also

"Keys for working with text" on page 279

Change what triple-clicking does

1 Choose Edit > Preferences > Type (Windows) or InCopy > Preferences > Type (Mac OS).

2 Select Triple Click To Select A Line to enable triple-clicking to select a line (this is the default). Deselect this option if you want triple-clicking to select a paragraph.

Paste text

You can paste text from another application or from Adobe InCopy.

See also

"Drag and drop text" on page 95

Paste text from another application

1 To preserve formatting and information such as styles and index markers, open the Clipboard Handling section of the Preferences dialog box, and select All Information under Paste. To remove these items and other formatting when pasting, select Text Only.

2 Cut or copy text in another application or in an InCopy document.

3 Do one of the following:

- Choose Edit > Paste. If the pasted text doesn't include all the formatting, you may need to change settings in the Import Options dialog box for RTF documents.
- Choose Edit > Paste Without Formatting. (Paste Without Formatting is dimmed if you paste text from another application when Text Only is selected in Clipboard Handling Preferences.)

Adjust spacing automatically when pasting text

When you paste text, spaces can be automatically added or removed, depending on the context. For example, if you cut a word and then paste it between two words, a space appears before and after the word. If you paste that word at the end of a sentence, before the period, a space is not added.

1 Choose Edit > Preferences > Type (Windows) or InCopy > Preferences > Type (Mac OS).

2 Select Adjust Spacing Automatically When Cutting And Pasting Words, and then click OK.

Drag and drop text

You can use the mouse to drag and drop text in Galley View, Story View, or Layout View. You can even drag text into some dialog boxes, such as Find/Change. Dragging text from a locked or checked-in story copies the text rather than moves it. You can also copy text when dragging.

1 To enable drag and drop, choose Edit > Preferences > Type (Windows) or InCopy > Preferences > Type (Mac OS), select Enable In Layout View, Enable In Story Editor (InDesign), or Enable In Galley/Story View (InCopy), and then click OK.

2 Select the text that you want to move or copy.

3 Hold the pointer over the selected text until the drag and drop icon appears, and then drag the text.

As you drag, the selected text remains in place, but a vertical bar indicates where the text will appear when you release the mouse button. The vertical bar appears in any text frame that you drag the mouse over.

4 Do any of the following:

- To drop the text in a new location, position the vertical bar where you would like the text to appear and release the mouse button.
- To drop the text without formatting, hold down Shift after you start dragging, and then release the mouse button before releasing the key.
- To copy the text, hold down Alt (Windows) or Option (Mac OS) after you start dragging, and then release the mouse button before releasing the key.

You can also use a combination of these modifier keys. For example, to copy unformatted text to a new frame, hold down Alt+Shift+Ctrl (Windows) or Option+Shift+Command (Mac OS) after you start dragging.

If the text you drop doesn't have the proper spacing, select the Adjust Spacing Automatically option in Type Preferences.

See also

"Paste text" on page 95

Transpose characters

If you transpose two adjacent characters as you type, you can correct them with the Transpose command. For example, if you typed *1243* instead of *1234*, the Transpose command switches the *4* and the *3*.

1 Place the insertion point between the two characters you want to transpose.

2 Choose Edit > Transpose.

Note: *The Transpose command applies only to characters and numbers within stories. It cannot move InCopy note anchors, tables, spaces, or other nonprinting characters. You cannot use Transpose in a locked story.*

See also

"Keys for working with text" on page 279

View hidden characters

When you're editing text, it's often useful to see nonprinting characters, such as spaces, tabs, and paragraph symbols. These characters are visible only in a document window; they won't output or print.

Growth in production of custom hand-made guitars by year:

1996	1997	1998
12	36	89

Growth·in·production·of·custom·
hand-made·guitars·by·year:¶

» 1996	» 1997	» 1998¶
» 12	» 36	» 89

Nonprinting characters hidden (top) and visible (bottom)

❖ Do one of the following:

- Choose Type > Show Hidden Characters. A check mark appears next to the menu command.
- Click the Show Hidden Characters button ¶ on the horizontal toolbar.

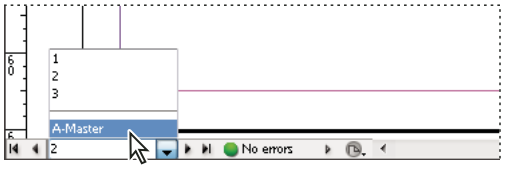
Edit text on a master page

In InDesign documents, a master page is a kind of template that applies to multiple pages. Master pages typically specify only common layout elements that appear on all pages of the document, such as the margins, page numbers, headers, and footers. You can use InCopy to edit the text on an InDesign master page if the text is a linked file. However, you cannot change any of the frame attributes controlled by the master, and you cannot edit master-page text from any other (regular) pages in the document.

Note: *If you can't click an insertion point into a nonlocked text frame on a regular page, that text might be on a master page. Check with the person who set up the frames and with your design team.*

1 Choose View > Layout View if your document is not already in Layout view.

2 Choose the master page from the page box at the lower left of the document window.



Selecting the InDesign master page

3 On the master page, select the text that you want to edit, and make the changes.

To edit text on a master page, the master page must include managed stories that are checked out.

Undo actions

You can undo or redo up to several hundred of the most recent actions. The exact number of actions you can undo is limited by the amount of RAM available and the kinds of actions you have performed. The record of recent actions is erased when you save, close, quit, or exit, so they can no longer be undone. You can also cancel an operation before it completes, or revert to a previously saved version.

❖ Do one of the following:

- To undo the most recent change, choose Edit > Undo [*action*]. (You cannot undo certain actions, such as scrolling.)

- To redo an action you just undid, choose Edit > Redo [*action*].
- To undo all changes made since the last time you saved the project, choose File > Revert Content.
- To stop a change that InCopy hasn't finished processing (for example, if you see a progress bar), press the Escape key.
- To close a dialog box without applying changes, click Cancel.

Jump to a position marker

A *position marker* is like a bookmark, and it is used to mark a location in a document. This is useful if you need to return to that location quickly or frequently. A document can have only one position marker.

1 Place the insertion point where you want to insert the marker.

2 Choose Edit > Position Marker > Insert Marker. (If you've already inserted a marker, choose Replace Marker.)

To jump to the marker from anywhere in the document, choose Edit > Position Marker > Go To Marker.

To clear the marker, choose Edit > Position Marker > Remove Marker. The marker is removed automatically when you close and reopen the document.

Add column, frame, and page breaks

Control column, frame, and page breaks by inserting special break characters in the text.

1 Using the Type tool, click to place the insertion point where you want the break to occur.

2 Choose Type > Insert Break Character, and then choose a break option from the submenu.

You can also create breaks by using the Enter key on the numeric keypad. For a column break, press Enter; for a frame break, press Shift+Enter; and for a page break, press Ctrl+Enter (Windows) or Command+Return (Mac OS).

To remove a break character, choose Type > Show Hidden Characters so that you can see nonprinting characters, and then select and delete the break character.

Note: *If you create a break by changing paragraph settings (as in the Keep Options dialog box), the break precedes the paragraph that contains the setting. If you create a break using a special character, the break occurs immediately after the special character.*

See also

"Ways to control paragraph breaks" on page 201

Break options

The following options appear on the Type > Insert Break Character menu:

Column break Flows text to the next column in the current text frame. If the frame has only one column, the text goes to the next threaded frame.

Frame break Flows text to the next threaded text frame, regardless of the current text frame's column setup.

Page break Flows text to the next page with a text frame threaded to the current text frame.

Odd page break Flows text to the next odd-numbered page with a text frame threaded to the current text frame.

Even page break Flows text to the next even-numbered page with a text frame threaded to the current text frame.

Paragraph Return ¶ Inserts a paragraph return (the same as pressing Enter or Return).

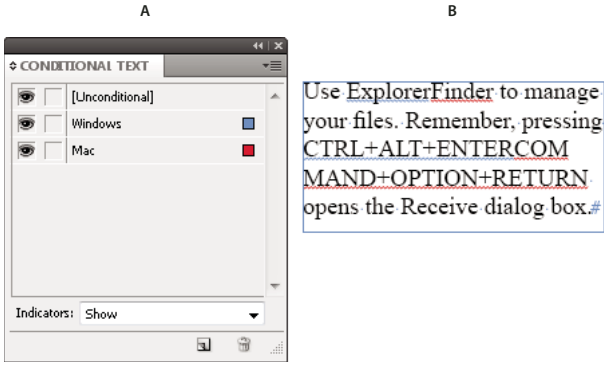
Forced Line Break ¬ Forces a line to break where the character is inserted, starting a new line without starting a new paragraph (the same as pressing Shift+Enter or Shift+Return). A forced line break is also called a soft return.

Discretionary Line Break Indicates where a line of text should break if the line needs to break. A discretionary line break is similar to a discretionary hyphen, only no hyphen is added where the line breaks.

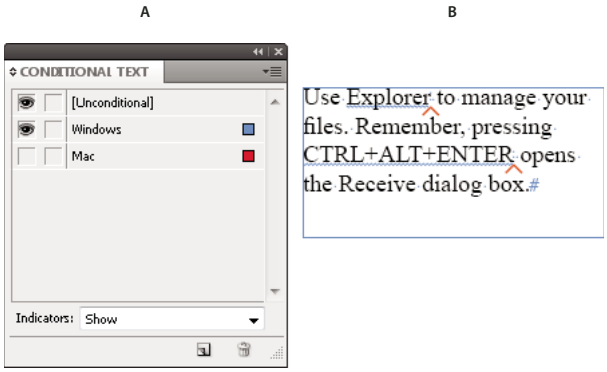
Related break options are available in the Keep Options dialog box and in the Paragraph Style Options dialog box.

Use conditional text

Conditional text is a way to create different versions of the same document. After you create conditions, you apply them to ranges of text. You can then create different versions of documents by showing and hiding conditions. For example, if you're creating a computer manual, you can create separate conditions for Mac OS and Windows. Before you print the Mac OS version of the user guide, you can show all text to which the "Mac" condition is applied and hide all text to which the "Windows" condition is applied. You can then reverse the condition states for printing the user guide for Windows.



Conditional text shown
A. *All conditions shown* ***B.*** *Conditional indicators*



Conditional text hidden
A. *"Mac" condition hidden* ***B.*** *Hidden condition symbols*

Conditions can be applied only to text. You can make anchored objects conditional, but only by selecting the anchored object marker. You can apply conditions to text within table cells, but you cannot apply conditions to table cells, columns, or rows. You cannot apply conditions to text in locked InCopy stories.

For a video tutorial on using conditional text, see www.adobe.com/go/lrvid4026_id.

Planning conditional documents

When planning a project with conditional text, examine the nature of the material and look at how several people can take turns working with it if the document is handed off. Plan to treat conditional text consistently to make the document easier to use and maintain. Use the following guidelines.

Number of versions Define how many versions your finished project will contain. For example, if you're creating a manual that describes a program that runs on both Windows and Mac OS platforms, you might want to produce at least two versions: a Windows version and a Mac OS version. If you want to produce these versions with editorial comments sprinkled in the text during the review process, you'll want even more versions: Mac OS with comments, Mac OS without comments, Windows with comments, and Windows without comments.

For documents with many conditions, you can define condition sets that can be applied to the document for quick versioning.

Number of condition tags required Decide how many condition tags you need to produce the desired versions. A version of a document is defined by a unique set of condition tags. For example, a version of a finished Windows manual might be defined by having a Windows condition tag showing, a Mac OS condition tag hidden, and a Comments condition tag hidden. In this example, you would need to decide whether to use one condition tag for Windows comments and another for Mac OS comments, or whether to use a single condition tag for both Windows and Mac OS comments.

Organization of content Evaluate the extent to which the document can be conditional and how you can organize the material to simplify development and maintenance. For example, you might be able to organize a book so that conditional text is limited to a few documents. Or you might choose to keep versions of a particular chapter in separate files rather than in conditional text, and then use a different book file for each version of the book.

In some instances, such as when working with multiple languages, you may want to create separate layers that you can show or hide rather than using conditions, with each layer including text from a different language.

Tagging strategy Determine the smallest unit of conditional text. For example, if a document will be translated to another language, a whole sentence should be the smallest amount of text you make conditional. Because word order often changes during translation, using conditional text for part of a sentence could complicate translation.

Inconsistency in applying conditions to spaces and punctuation can result in extra spacing or misspelled words. Decide whether to make spaces and punctuation conditional. If conditional text begins or ends with punctuation, make the punctuation conditional too. This makes the text easier to read when you're viewing more than one version.

To avoid word spacing problems, such as having an unconditional space followed by a conditional space, set standards for handling spaces following conditional text (either always conditional or always unconditional).

To avoid confusion, decide the order in which conditional text will appear and use this order throughout the document.

Indexes and cross-references When indexing a document, pay attention to whether index markers are placed inside or outside conditional text. Keep in mind that index markers in hidden conditional text are not included in the generated index.

If you create a cross-reference to conditional text, make sure that the source text has the same condition. For example, if you add a cross-reference in a "Windows" paragraph and the text anchor appears in a "Mac" condition, the cross-reference is unresolved when the "Mac" condition is hidden. "HT" appears next to the cross-reference in the Hyperlinks panel.

If you create a cross-reference to a paragraph in which some text is conditional and then change the visibility settings of that condition, update the cross-reference.

Create conditions

Conditions you create are saved in the current document. If no documents are open when you create a condition, that condition appears in all new documents you create.

You can make conditional text easy to identify by specifying condition *indicators*, such as wavy red underlines.

In managed InCopy files, you can apply existing conditions, but you cannot create or delete conditions. You can hide or show conditional text in InCopy, but the changes do not appear in InDesign when the managed file is checked in. In InCopy standalone documents, you can create, apply, and change the visibility of conditions as in InDesign.

1 Choose Window > Type & Tables > Conditional Text to display the Conditional Text panel.

2 Choose New Condition from the Conditional Text panel menu, and type a name for the condition.

3 In the Indicator group, specify the appearance of the indicator to which the condition is applied.

By default, indicators (such as wavy red lines) are set to appear in the document but not be printed or output. You can choose an option from the Indicators menu in the Conditional Text panel to hide indicators or to print and output them, which can be useful for review purposes.

4 Click OK.

Apply conditions to text

You can apply multiple conditions to the same text. By default, condition indicators identify conditional text. However, if indicators are hidden, you can use the Conditional Text panel to determine which conditions have been applied to the current text. A solid check mark indicates the condition is applied to the current text. A dim check mark indicates that the condition is applied only to part of the selection.

1 Select the text to which you want to apply the condition.

2 In the Conditional Text panel (Windows > Type & Tables > Conditional Text), do any of the following:

- To apply a condition, click the condition, or click the box next to the condition name.
- To apply a condition and remove other conditions applied to the text, Alt-click (Windows) or Option-click (Mac OS) a condition.
- To remove a condition, click the box next to the condition name to remove the check mark. Or, click [Unconditional] to remove all conditions from the selected text.

Note: *You cannot apply keyboard shortcuts to specific conditions. However, you can apply conditions using Quick Apply.*

Show or hide conditions

When you hide a condition, all text to which that condition is applied is hidden. Hiding conditions often causes the page numbering to change in a document or book. You can use the Smart Text Reflow feature to add and remove pages automatically as you hide and show conditions.

Hidden conditional text is generally ignored in the document. For example, hidden text is not printed or exported, index markers in hidden conditional text are not included in a generated index, and hidden conditional text is not included when searching or spell-checking text.

When you hide a condition, the hidden text is stored in a hidden condition symbol . If you select text that contains a hidden condition symbol and try to delete it, InCopy prompts you to confirm that you want to delete the hidden conditional text. You cannot apply other conditions, styles, or formatting to hidden conditional text.

If text has several conditions applied to it and at least one of those conditions is shown while another is hidden, the text is not hidden.

- To show or hide individual conditions, click the visibility box next to a condition name. The eye icon indicates the condition is shown.
- To show or hide all conditions, choose Show All or Hide All from the Conditional Text panel menu.

Use condition sets

A condition set captures the visibility settings for all conditions so that you can quickly apply different document renditions. For example, suppose you have a complex document with platform conditions for Mac OS, Windows XP, Vista, UNIX , language conditions for English, French, German, and Spanish, and editorial conditions such as Editorial Review and Internal Comments. For reviewing the Vista version in French, you can create a set that shows only the Vista, French, and Editorial Review conditions, and hides all the rest.

While sets aren't necessary to do this, they help you quickly and reliably change different condition visibility settings.

1. Apply conditions to text as necessary.
2. If the Set menu doesn't appear in the Conditional Text panel, choose Show Options from the Conditional Text panel menu.
3. In the Conditional Text panel, make the conditions visible or hidden as needed.
4. Choose Create New Set from the Set menu, specify a name for the set, and click OK.

The new set becomes the active set.

5. Do any of the following:

- To apply the condition set to a document, choose the condition set name from the Set menu.
- To override a condition set, select the set to make it active, and change the visibility setting of any condition. A plus sign (+) appears next to the condition set. Choose the condition set again to remove overrides. Choose Redefine "*[Condition Set]*" to update the condition set with the new visibility settings.
- To delete a condition set, select the condition set, and then choose Delete "*[Condition Set]*."

Manage conditions

❖ Do any of the following:

Delete a condition Select a condition and click the Delete Condition icon at the bottom of the Conditional Text panel. Specify a condition to replace the deleted condition and click OK. The condition you specify is applied to all text to which the deleted condition was applied.

To delete multiple conditions, Shift-click to select contiguous conditions, or Ctrl-click (Windows) or Command-click (Mac OS) to select non-contiguous conditions, and then click the Delete Condition icon.

Remove a condition from text Removing a condition tag from text is different from deleting a tag from a document. When you remove a tag from text, the tag remains in the document so it can be applied again later.

To remove a condition from text, select the text and click the box next to the condition to remove the check mark, or click [Unconditional] to remove all conditions from the selected text.

Load (import) conditions Choose Load Conditions (to load only conditions) or Load Conditions And Sets from the Conditional Text panel menu. Select the InDesign document from which you want to import the conditions, and click Open. Loaded conditions and sets replace any condition or set that has an identical name.

You cannot load conditions from an InCopy file in InDesign, but you can load conditions from an InDesign file in both InDesign and InCopy.

Loaded sets ignore the visibility settings of the conditions currently in the Conditional Text panel.

Synchronize conditions in a book To make sure you're using the same conditions in all documents in a book, create the conditions you want in the style source document, select Conditional Text Settings in the Synchronize Options dialog box, and then synchronize the book.

Show or hide condition indicators Choose Show or Hide from the Indicators menu in the Conditional Text panel to show or hide condition indicators. If you're showing one version and want to see which areas are conditional, show the condition indicators. If you find the condition indicators distracting while viewing the layout, hide the condition indicators. Choose Show And Print if you want the condition indicators to be printed and output.

Change a condition name In the Conditional Text panel, click a condition, pause, and then click the condition name to select it. Type a different name.

Edit condition indicators In the Conditional Text panel, double-click a condition, or select a condition and choose Condition Options from the panel menu. Specify indicator settings, and click OK.

Find and change conditional text

Use the Find/Change dialog box to find text to which one or more conditions have been applied and replace it with one or more other conditions.

1 Show any conditional text you want included in the search.

Hidden text is excluded from the search.

2 Choose Edit > Find/Change.

3 If the Find Format and Change Format boxes don't appear at the bottom of the dialog box, click More Options.

4 Click the Find Format box to display the Find Format Settings dialog box. Under Conditions, select [Any Condition] to search for text in which any conditon is applied, [Unconditional] to search for text in which no condition is applied, or select the specific condition or conditions you want to search for. Click OK.

This feature finds text that perfectly matches the selected conditions. For example, if you select both Condition 1 and Condition 2, text to which only one of the conditions are applied isn't found, nor is text found to which these two conditions and another is applied.

5 Click the Change Format box to display the Change Format Settings dialog box. Specify the different formatting option, such as a condition or a character style, and then click OK.

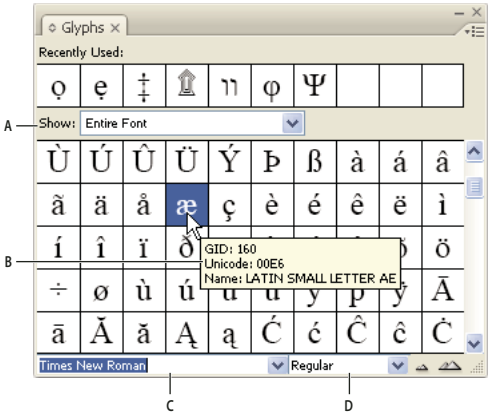
If you select the Conditions section in the Change Format Settings dialog box, the [Any Condition] makes no changes to the found conditional text. This option is useful if you want to apply different formatting, such as a character style. Select [Unconditional] to remove all conditions from the found text. If you select a specific condition, specify whether you want it to replace any condition applied to the found text or be added to it.

6 Click Find, and then use the Change, Change/Find, or Change All buttons to replace the condition.

Glyphs and special characters

Glyphs panel overview

Enter glyphs by way of the Glyphs panel. The panel initially shows glyphs in the font where the cursor is located, but you can view a different font, view a type style in the font (for example, Light, Regular, or Bold), and make the panel display a subset of glyphs in the font (for example, math symbols, numbers, or punctuation symbols).



Glyphs panel
A. *Show subset of glyphs* ***B.*** *Tool tip* ***C.*** *Font list* ***D.*** *Font style*

By moving the pointer over a glyph, you can read its CID/GID value, Unicode value, and name in a tool tip.

Open the Glyphs panel

❖ Choose Type > Glyphs or Window > Type & Tables > Glyphs.

Change the Glyphs panel view

- Click the cycle widget (it's located to the left of the word "Glyphs" on the Glyphs panel) to change views of the panel. Clicking the widget presents these views in succession: the collapsed panel, the entire panel, and the panel without recently used glyphs.
- Click the Zoom In or Zoom Out buttons in the lower-right corner of the Glyphs panel.
- Resize the Glyphs panel by dragging the lower-right corner.

Filter the glyphs that appear

❖ Do one of the following on the Show list to determine which glyphs appear on the Glyphs panel:

- Choose Entire Font to display all glyphs available in the font.
- Choose an option below Entire Font to narrow the list to a subset of glyphs. For example, Punctuation displays only punctuation glyphs; Math Symbols narrows the choices to mathematical symbols.

Sort glyphs in the Glyphs panel

❖ Choose By CID / GID or By Unicode to determine how glyphs are sorted in the Glyphs panel.

Insert glyphs and special characters

A *glyph* is a specific form of a character. For example, in certain fonts, the capital letter A is available in several forms, such as swash and small cap. You can use the Glyphs panel to locate any glyph in a font.

OpenType fonts such as Adobe Caslon™ Pro provide multiple glyphs for many standard characters. Use the Glyphs panel when you want to insert these alternate glyphs in your document. You can also use the Glyphs panel to view and insert OpenType attributes such as ornaments, swashes, fractions, and ligatures.

See also

"OpenType fonts" on page 186

"Glyphs panel overview" on page 103

Insert special characters

You can insert common characters such as em dashes and en dashes, registered trademark symbols, and ellipses.

1 Using the Type tool, position the insertion point where you want to insert a character.

2 Choose Type > Insert Special Character, and then select an option from any of the categories in the menu.

If special characters that you use repeatedly do not appear on the list of special characters, add them to a glyph set that you create.

See also

"Create and edit custom glyph sets" on page 107

Insert a glyph from a specified font

1 Using the Type tool, click to place the insertion point where you want to enter a character.

2 Choose Type > Glyphs to display the Glyphs panel.

3 To display a different set of characters in the Glyphs panel, do any of the following:

- Select a different font and type style, if available. From the Show menu, choose Entire Font. Or, if you selected an OpenType font, choose from a number of OpenType categories.
- Choose a custom glyph set from the Show menu. (See "Create and edit custom glyph sets" on page 107.)

4 Scroll through the display of characters until you see the glyph you want to insert. If you selected an OpenType font, you can display a pop-up menu of alternate glyphs by clicking and holding the glyph box.

5 Double-click the character you want to insert. The character appears at the text insertion point.

Insert a recently used glyph

InCopy tracks the previous 35 distinct glyphs you inserted and makes them available under Recently Used in the first row of the Glyphs panel (you have to expand the panel to see all 35 glyphs on the first row).

❖ Do one of the following:

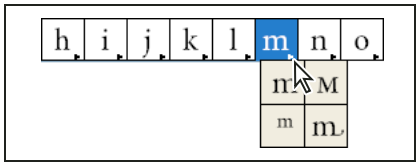
- Double-click a glyph under Recently Used.
- Choose Recent Glyphs on the Show list to display all recently used glyphs in the main body of the Glyphs panel, and then double-click a glyph.

Clear recently used glyphs

- To clear a selected glyph from the Recently Used section, right-click (Windows®) or Control-click (Mac OS) a glyph in the Recently Used section, and then choose Delete Glyph From Recently Used.
- To clear all recently used glyphs, choose Clear All Recently Used.

Replace a character with an alternate glyph

When a character includes alternate glyphs, it appears in the Glyphs panel with a triangle icon in the lower-right corner. You can click and hold the character in the Glyphs panel to display a pop-up menu of the alternate glyphs, or you can display alternate glyphs in the Glyphs panel.



Selecting alternate glyphs in OpenType font

1 Choose Type > Glyphs to display the Glyphs panel.

2 Select Alternates For Selection from the Show list.

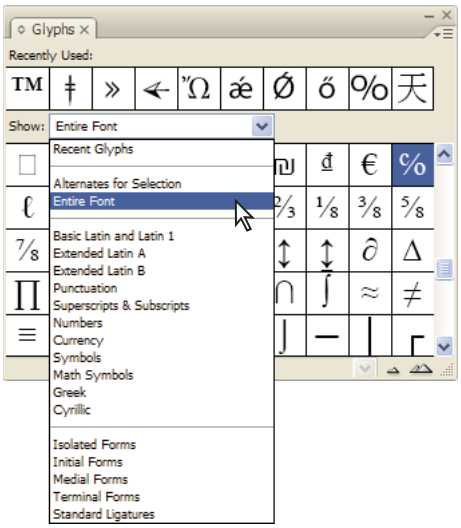
3 Using the Type tool, select a character in your document.

4 Do one of the following to replace the selected character in the document:

- Double-click a glyph in the Glyphs panel.
- Select a glyph on the menu.

Display OpenType glyph attributes in the Glyphs panel

For easy selection, the Glyphs panel allows you to display characters for only the selected OpenType attributes. You can select various options from the Show menu in the Glyphs panel.



Show menu options in the Glyphs panel

1 In the Glyphs panel, choose an OpenType font from the font list.

2 Choose an option from the Show menu.

The options displayed vary depending on which font is selected. For information on applying OpenType font attributes, see "Apply OpenType font attributes" on page 187. For more information on OpenType fonts, see www.adobe.com/go/opentype.

Highlight alternate glyphs in the text

1 Choose Edit > Preferences > Composition (Windows) or InCopy > Preferences > Composition (Mac OS).

2 Select Substituted Glyphs, and then click OK. Substituted glyphs in the text are highlighted in nonprinting yellow.

Create and edit custom glyph sets

A *glyph set* is a named collection of glyphs from one or more fonts. Saving commonly used glyphs in a glyph set prevents you from having to look for them each time you need to use them. Glyph sets are not attached to any particular document; they are stored with other InDesign preferences in a separate file that can be shared.

You can determine whether the font is remembered with the added glyph. Remembering fonts is useful, for example, when you are working with dingbat characters that may not appear in other fonts. If a glyph's font is remembered, but the font is missing, the font's square appears in pink in the Glyphs panel and the Edit Glyph Set dialog box. If a font is not remembered with an added glyph, a "u" appears next to the glyph, indicating that the font's unicode value determines the appearance of the glyph.

Create a custom glyph set

1 Choose Type > Glyphs.

2 Do one of the following:

- From the Glyphs panel menu, choose New Glyph Set.
- Open the context menu on the Glyphs panel and choose New Glyph Set.

3 Type the name of the glyph set.

4 Choose the insert order in which glyphs will be added to the glyph set, and click OK:

Insert At Front Each new glyph is listed first in the set.

Append At End Each new glyph is listed last in the set.

Unicode Order All glyphs are listed by the order of their unicode values.

5 To add glyphs to the custom set, select the font containing the glyph at the bottom of the Glyphs panel, click the glyph to select it, and then choose the name of the custom glyph set from the Add To Glyph Set menu on the Glyphs panel menu.

View a custom glyph set

❖ Do one of the following on the Glyphs panel:

- Choose the glyph set on the Show list.
- On the Glyphs panel menu, choose View Glyph Set, and then the name of the glyph set.

Edit custom glyph sets

1 Choose Edit Glyph Set from the Glyph panel menu, and then choose the custom glyph set.

2 Select the glyph you want to edit, do any of the following, and then click OK:

- To bind the glyph to its font, select Remember Font With Glyph. A glyph that remembers its font ignores the font applied to the selected text in the document when the glyph is inserted into that text. It also ignores the font specified in the Glyph panel itself. If you deselect this option, the Unicode value of the current font is used.
- To view additional glyphs, choose a different font or style. If the glyph is not defined with a font, you cannot select a different font.
- To remove a glyph from the custom glyph set, choose Delete From Set.
- To change the order in which glyphs are added to the set, choose an Insert Order option. Unicode Order is not available if Insert At Front or Append At End was selected when the glyph set was created.

Delete glyphs from custom glyph sets

1 In the Glyphs panel, choose the Custom Glyph Set from the Show menu.

2 Right-click (Windows) or Control-click (Mac OS) a glyph, and then choose Delete Glyph From Set.

Delete custom glyph sets

1 Do one of the following:

- From the Glyphs panel menu, choose Delete Glyph Set.
- From the context menu, choose Delete Glyph Set.

2 Click the name of a custom glyph set.

3 Click Yes to confirm.

Save and load glyph sets

Custom glyph sets are stored in files kept in the Glyph Sets folder, a subfolder of the Presets folder. You can copy glyph set files to other computers and in so doing make custom glyph sets available to others. Copy glyph set files to and from these folders to share them with others:

Mac OS Users*[username]*\Library\Preferences\Adobe InCopy *[Version]**[Language]*\Presets\Glyph Sets

Windows XP Documents and Settings*[username]*\Application Data\Adobe\InCopy *[Version]**[Language]*\Glyph Sets

Windows Vista Users*[username]*\AppData\Roaming\Adobe\InCopy *[Version]**[Language]*\Glyph Sets

Use quotation marks

You can specify different quotation marks for different languages. These quotation mark characters appear automatically during typing if the Use Typographer's Quotes option is selected in the Type section of the Preferences dialog box.

Specify which quotation marks to use

1 Choose Edit > Preferences > Dictionary (Windows) or InCopy > Preferences > Dictionary (Mac OS).

2 Choose a language from the Language menu.

3 Do any of the following, and then click OK:

- For Double Quotes, select a pair of quotation marks, or type the pair of characters you want to use.
- For Single Quotes, select a pair of quotation marks, or type the pair of characters you want to use.

Insert straight quotation marks

❖ Do one of the following:

- Choose Type > Insert Special Character > Quotation Marks > Straight Double Quotation Marks or Straight Single Quotation Mark (Apostrophe).
- Deselect the Use Typographer's Quotes option in the Type section of the Preferences dialog box, and then type the quotation mark or apostrophe.
- Press Shift+Ctrl+Alt+' (Windows) or Shift+Command+Option+' (Mac OS) to switch between turning on and off the Use Typographer's Quotes preferences option.

The character frequently used to indicate feet, arcminutes, or minutes of time is the prime mark. It looks like a slanted apostrophe. The character frequently used to indicate inches, arcseconds, or seconds of time is the double prime mark. These symbols are different from apostrophes and double quotation marks. Some fonts include the prime and double prime marks. Use the Glyphs panel to insert these marks. If the font doesn't have a prime or double prime mark, insert the straight quotation mark, and italicize it.

Insert white space characters

A *white space character* is a blank space that appears between characters. You can use white-space characters for many different purposes, such as preventing two words from being broken at the end of a line.

1 Using the Type tool, position the insertion point where you want to insert a certain amount of white space.

2 Choose Type > Insert White Space, and then select one of the spacing options (such as Em Space) in the context menu.

Representative symbols of the white-space characters appear when you choose Type > Show Hidden Characters.

White space options

The following options appear on the Type > Insert White Space menu:

Em Space Equal in width to the size of the type. In 12-point type, an em space is 12 points wide.

En Space One-half the width of an em space.

Nonbreaking Space The same flexible width as pressing the spacebar, but it prevents the line from being broken at the space character.

Nonbreaking Space (Fixed Width) A fixed width space prevents the line from being broken at the space character, but does not expand or compress in justified text. The fixed width space is identical to the Nonbreaking Space character inserted in InCopy CS2.

Third Space One-third the width of an em space.

Quarter Space One-fourth the width of an em space.

Sixth Space One-sixth the width of an em space.

Flush Space Adds a variable amount of space to the last line of a fully justified paragraph, useful for justifying text in the last line. (See "Change Justification settings" on page 223.)

Hair Space One-twenty-fourth the width of an em space.

Thin Space One-eighth the width of an em space. You may want to use a thin space on either side of an em dash or en dash.

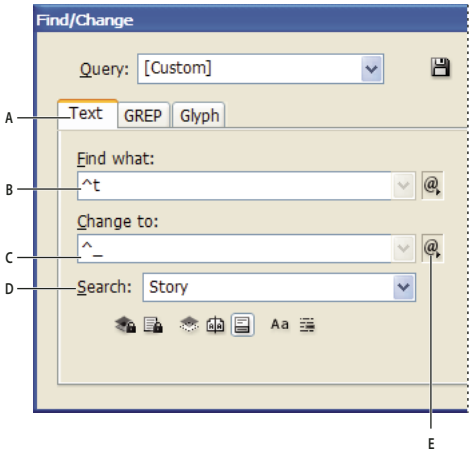
Figure Space Same width as a number in the typeface. Use a figure space to help align numbers in financial tables.

Punctuation Space Same width as an exclamation point, period, or colon in the typeface.

Find/Change

Find/Change overview

The Find/Change dialog box contains tabs that let you specify what you want to find and change.



Find/Change dialog box
***A** Find/Change tabs **B.** Find a tab character **C.** Replace with an em dash **D.** Search options **E.** Metacharacters menu*

Text Search for and change specific occurrences of characters, words, groups of words, or text formatted a certain way. You can also search for and replace special characters such as symbols, markers, and white space characters. Wildcard options help to broaden your search.

GREP Use advanced, pattern-based search techniques to search for and replace text and formatting.

Glyph Search for and replace glyphs using Unicode or GID/CID values, especially useful to search for and replace glyphs in Asian languages.

For a video tutorial on finding and changing text, objects, and expressions, see www.adobe.com/go/vid0080.

See also

Find/Change video

Find and change text

If you want to list, find, and replace fonts in your document, you might want to use the Find Font command instead of the Find/Change command.

See also

"Find and change fonts" on page 122

Find and change text

1 To search a range of text or a story, select the text or place the insertion point in the story. To search more than one document, open the documents.

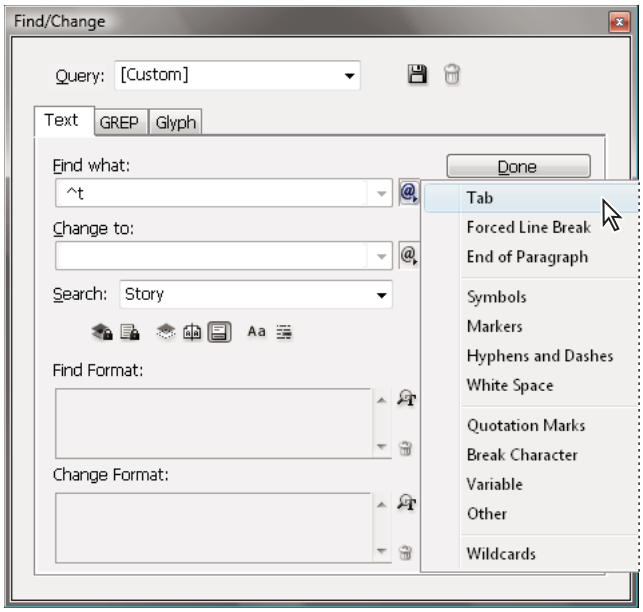
2 Choose Edit > Find/Change, and then click the Text tab.

3 Specify the range of your search from the Search menu, and click icons to include locked layers, master pages, footnotes, and other items in the search.

4 In the Find What box, describe what you want to search for:

- Type or paste the text you want to find.

- To search for or replace tabs, spaces, or other special characters, select a representative character (*metacharacter*) from the pop-up menu to the right of the Find What box. You can also choose wildcard options such as Any Digit or Any Character.



Use metacharacters to search for special characters, such as a tab.

- Use a predefined query to find and replace text. (See "Find/change items using queries" on page 123.)

5 In the Change To box, type or paste the replacement text. You can also select a representative character from the pop-up menu to the right of the Change To box.

6 Click Find.

7 To continue searching, click Find Next, Change (to change the current occurrence), Change All (a message indicates the total number of changes), or Change/Find (to change the current occurrence and search for the next one).

8 Click Done.

If you don't get the search results you expected, make sure that you clear any formatting you may have included in a previous search. You may also need to expand your search. For example, you may be searching only a selection or a story instead of the document. Or, you may be searching for text that appears on an item, such as a locked layer, footnote, or hidden conditional text, that is currently excluded from the search.

If you change your mind about replacing text, choose Edit > Undo Replace Text (or Undo Replace All Text).

To find the next occurrence of a previously searched-for phrase without having to open the Find/Change dialog box, choose Edit > Find Next. In addition, previous search strings are stored in the Find/Change dialog box. You can select a search string from the menu to the right of the option.

Find and change formatted text

1 Choose Edit > Find/Change.

2 If the Find Format and Change Format options don't appear, click More Options.

3 Click the Find Format box, or click the Specify Attributes To Find icon to the right of the Find Format Settings section.

4 On the left side of the Find Format Settings dialog box, select a type of formatting, specify the format attributes, and then click OK.

Some OpenType formatting options appear in both the OpenType Options and Basic Character Formats (Position menu) sections. For information on OpenType and other formatting attributes, search for the related topic in InCopy Help.

Note: *To search for (or replace with) formatting only, leave the Find What or Change To box blank.*

5 If you want to apply formatting to the text found, click the Change Format box, or click the Specify Attributes To Change icon in the Change Format Settings section. Then select a type of formatting, specify the format attributes, and click OK.

6 Use the Find and Change buttons to format the text.

If you specify formatting for your search criteria, info icons appear above the Find What or Change To boxes. These icons indicate that formatting attributes have been set and that the find or change operation will be restricted accordingly.

To quickly remove all formatting attributes in the Find Format Settings or Change Format Settings sections, click the Clear button.

Common Find/Change techniques

Wildcard searches Specify wildcards, such as Any Digit or Any White Space, to broaden your search. For example, typing "s^?ng" in the Find What box searches for words beginning with an "s" and ending with "ng," such as "sing," "sang," "song," and "sung." You can either type wildcard characters or choose an option from the Wildcards submenu in the pop-up menu next to the Find What text field.

Clipboard for metacharacter searches To search for metacharacters such as em dashes or bullet characters, you may want to select the text first and paste it into the Find What box to spare the trouble of entering metacharacters. InCopy automatically converts pasted special characters to their metacharacter equivalent.

Replace with clipboard contents You can replace search items with either formatted or unformatted content copied to the clipboard. You can even replace text with a graphic you copied. Simply copy the item, and then, in the Find/Change dialog box, choose an option from the Other submenu from the pop-up menu to the right of the Change To box.

Find and remove unwanted text To remove unwanted text, define the text you want to remove in the Find What box and leave the Change To box empty (make sure that no formatting is set in this box).

XML tagging You can apply XML tags to text you search for.

Notes on finding and changing text in InCopy

- If the Track Changes command is turned on when you are changing or replacing text, all added and deleted text is tracked.
- All finding and changing procedures work essentially the same way in Galley, Story, and Layout views, whether you work with a linked or stand-alone story. If you work with a linked story, you're limited to character and paragraph styles defined in InDesign. When you work in Galley or Story view, you cannot see all of the typographical effects you apply. You can see these effects only in Layout view.
- In Galley view or Story view, the Find/Change command omits all collapsed stories. However, if you choose Change All, collapsed stories are affected. For best results, use Find/Change in Layout View.
- The Include Note Content in Find/Change Operations in Notes preferences determines whether notes are searched. If this option is selected, you can use the Find/Change command to search notes in Galley and Story views, not in Layout view. Closed notes and footnotes are omitted from the search.

Search options for finding and changing text

Search menu Contains options that determine the range of the search.

- **Documents** Search the entire document or All Documents to search all open documents.
- **Story** Search all text in the currently selected frame, including text in other threaded text frames and overset text. Select Stories to search stories in all selected frames. This option appears only if a text frame is selected or an insertion point is placed.
- **To End Of Story** Search from the insertion point. This option appears only if an insertion point is placed.
- **Selection** Search only selected text. This option appears only if text is selected.

Include Locked Layers Searches for text on layers that have been locked using the Layer Options dialog box. You cannot replace text on locked layers.

Include Locked Stories Searches for text in stories that have been checked out in Adobe Version Cue or as part of an InCopy workflow. You cannot replace text in locked stories.

Include Hidden Layers Searches for text on layers that have been hidden using the Layer Options dialog box. When text on a hidden layer is found, you can see highlighting where the text appears, but you cannot see the text. You can replace text on hidden layers.

Text in a hidden condition is always omitted from searching.

Include Master Pages Searches for text on master pages.

Include Footnotes Searches footnote text.

Case Sensitive Searches for only the word or words that exactly match the capitalization of the text in the Find What box. For example, a search for *PrePress* won't find *Prepress*, *prepress*, or *PREPRESS*.

Whole Word Disregards search characters if they are part of another word. For example, if you search for *any* as a whole word, InDesign disregards *many*.

Search using GREP expressions

On the GREP tab of the Find/Change dialog box, you can construct GREP expressions to find alphanumeric strings and patterns in long documents or many open documents. You can enter the GREP metacharacters manually or choose them from the Special Characters For Search list. GREP searches are case-sensitive by default.

1. Choose Edit > Find/Change, and click the GREP tab.
2. At the bottom of the dialog box, specify the range of your search from the Search menu, and click icons to include locked layers, master pages, footnotes, and other items in the search.
3. In the Find What box, do any of the following to construct a GREP expression:
   - Enter the search expression manually. (See "Metacharacters for searching" on page 117.)
   - Click the Special Characters For Search icon to the right of the Find What option and choose options from the Locations, Repeat, Match, Modifiers, and Posix submenus to help construct the search expression.
4. In the Change To box, type or paste the replacement text.
5. Click Find.
6. To continue searching, click Find Next, Change (to change the current occurrence), Change All (a message indicates the total number of changes), or Change/Find (to change the current occurrence and search for the next one.

You can also use GREP Styles to apply a character style to text that conforms to a GREP expression. In fact, the GREP Styles dialog box is a good way to test your GREP expression. Add the examples you want to find to a paragraph, and then specify a character style and GREP expression in the GREP Styles dialog box. When you turn on Preview, you can edit the expression until it affects all your examples properly.

See also

"Create GREP styles" on page 180

"Metacharacters for searching" on page 117

Tips for constructing GREP searches

Here are some tips for constructing GREP expressions.

- Many searches under the GREP tab are similar to those under the Text tab, but be aware that you need to insert different codes depending on which tab you're using. In general, the Text tab metacharacters begin with a ^ (such as ^t for a tab) and GREP tab metacharacters begin with a \ (such as \t for a tab). However, not all metacharacters follow this rule. For example, a paragraph return is ^p in the Text tab and \r in the GREP tab. For a list of the metacharacters used for the Text and GREP tabs, see "Metacharacters for searching" on page 117.
- To search for a character that has symbolic meaning in GREP, enter a backslash (\) before the character to indicate that the character that follows is literal. For example, a period (.) searches for any character in a GREP search; to search for an actual period, enter "\."
- Save the GREP search as a query if you intend to run it often or share it with someone else. (See "Find/change items using queries" on page 123.)
- Use parentheses to divide your search into subexpressions. For example, if you want to search for "cat" or "cot," you can use the c(a|o)t string. Parentheses are especially useful to identify groupings. For example, searching for "the (cat) and the (dog)" identifies "cat" as Found Text 1 and "dog" as Found Text 2. You can use the Found Text expressions (such as $1 for Found Text 1) to change only part of the found text.

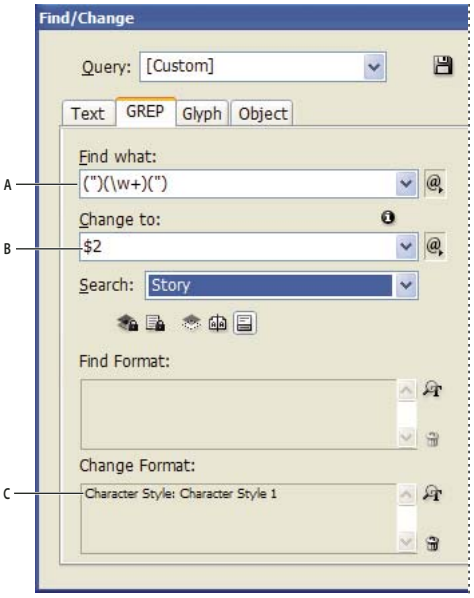
GREP search examples

Follow these examples to learn how to take advantage of GREP expressions.

Example 1: Finding text within quotation marks

Suppose you want to search for any word enclosed in quotation marks (such as "Spain"), and you want to remove the quotation marks and apply a style to the word (so that it becomes *Spain* instead of "Spain"). The expression `(")(\w+)(")` includes three groupings, as indicated by parentheses ( ). The first and third groupings search for any quotation mark, and the second grouping searches for one or more word characters.

You can use the Found Text expressions to refer to these groupings. For example, $0 refers to all found text, and $2 refers to only the second grouping. By inserting $2 in the Change To field and specifying a character style in the Change Format field, you can search for a word within quotation marks, and then replace the word with a character style. Because only $2 is specified, the $1 and $3 groupings are removed. (Specifying $0 or $1$2$3 in the Change To field would apply the character style to the quotation marks as well.)



GREP example
A. *Finds all word characters enclosed in quotation marks* ***B.*** *The character style is applied to the second grouping (the word) while the first two groupings (open and close quotes) are removed* ***C.*** *Character style specified*

This example searches only for single words enclosed in quotation marks. If you want to search for phrases enclosed in parentheses, add wildcard expressions, such as (\s*.*\w*\d*), which looks for spaces, characters, word characters, and digits.

Example 2: Phone numbers

InDesign includes a number of search presets that you can choose from the Queries menu. For example, you can choose the Phone Number Conversion query, which looks like this:

\(?(\d\d\d)\)?[-.]?(\d\d\d)[-.]?(\d\d\d\d)

Phone numbers in the United States can appear in a variety of formats, such as 206-555-3982, (206) 555-3982, 206.555.3982, and 206 555 3982. This string looks for any of these variations. The first three digits (\d\d\d) of the phone number may or may not be enclosed in parentheses, so a question mark appears after the parentheses: \(? and \)?. Note that the backslash \ indicates that the actual parenthesis is being searched for and that it's not part of a subexpression. The brackets [ ] locate any character within them, so in this case, [-.] finds either a hyphen, a period, or a space. The question mark after the brackets indicate that the items within it are optional in the search. Finally, the digits are enclosed in parentheses, which signify groupings that can be referred to in the Change To field.

You can edit the grouping references in the Change To field to suit your needs. For example, you could use these expressions:

206.555.3982 = $1.$2.$3

206-555-3982 = $1-$2-$3

(206) 555-3982 = ($1) $2-$3

206 555 3982 = $1 $2 $3

Additional GREP examples

Experiment with these examples to learn more about GREP searches.

Expression	Search string	Sample text	Matches (in bold)
Class of characters [ ]	[abc] Finds the letter a, b, or c.	Maria cuenta bien.	M**a**ri**ac**uent**ab**ien.
Beginning of paragraph ^	^~_.+ This searches the beginning of the paragraph (^) for an em dash (~_) followed by any character (.) one or more times (+).	"We saw—or at least we think we saw—a purple cow." —Konrad Yoes	"We saw—or at least we think we saw—a purple cow." **—Konrad Yoes**
Negative lookahead (?!*pattern*)	InDesign (?!CS.*?) The negative lookahead matches the search string only if it is not followed by the specified pattern.	InDesign, InDesign 2.0, InDesign CS, and InDesign CS2	**InDesign**, **InDesign** 2.0, InDesign CS, and InDesign CS2
Positive lookahead (?=*pattern*)	InDesign (?=CS.*?) The positive lookahead matches the search string only if it is followed by the specified pattern. Use similar patterns for negative lookbehinds (?<!*pattern*) and positive lookbehinds (?<=*pattern*).	InDesign, InDesign 2.0, InDesign CS, and InDesign CS2	InDesign, InDesign 2.0, **InDesign** CS, and **InDesign** CS2
Groupings ( )	(quick) (brown) (fox)	The quick brown fox jumps up and down.	The **quick brown fox** jumps up and down. All found text = quick brown fox; Found Text 1= quick; Found Text 2 = brown; Found Text 3= fox
Non-marking parentheses (?:*expression*)	(quick) ($:brown) (fox)	The quick brown fox jumps up and down.	The **quick brown fox** jumps up and down. All found text = quick brown fox; Found Text 1= quick; Found Text 2 = fox
Case-insensitive on (?i)	(?i)apple You can also use (?i:apple)	Apple apple APPLE	**AppleappleAPPLE**
Case-insensitive off (?-i)	(?-i)apple	Apple apple APPLE	Apple **apple** APPLE
Multiline on (?m)	(?m)^\w+ In this example, the expression looks for one or more (+) word characters (\w) at the beginning of a line (^). The (?m) expression allows all lines within the found text to be treated as separate lines. (?m)^\w matches the beginning of each paragraph. (?-m)^\w matches only the beginning of the story.	One Two Three Four Five Six Seven Eight	**One** Two Three**Four** Five Six**Seven** Eight
Multiline off (?-m)	(?-m)^\w+	One Two Three Four Five Six Seven Eight	**One** Two Three Four Five Six Seven Eight

Expression	Search string	Sample text	Matches (in bold)
Single-line on (?s)	(?s)c.a The searches for any character (.) between the letters c and a. The (?s) expression matches any character, even if it falls on the next line. (.) matches anything other than a paragraph return. (?s)(.) matches anything, including paragraph returns.	abc abc abc abc	ab**c a**b**ca**b**c a**bc
Single-line off	(?-s)c.a	abc abc abc abc	ab**c a**bc ab**c a**bc
Repeat number of times { }	b{3} matches exactly 3 times b(3,} matches at least 3 times b{3,}? matches at least 3 times (shortest match) b{2,3} matches at least 2 times and not more than 3 b{2,3}? matches at least 2 times and not more than 3 (shortest match)	abbc abbbc abbbbc abbbbbc	abbc a**bbb**c a**bbb**bc a**bbb**bbc abbc a**bbb**c a**bbbb**c a**bbbbb**c abbc a**bbb**c a**bbb**bc a**bbb**bbc a**bb**c a**bbb**c a**bbb**bc a**bbb**bbc a**bb**c a**bb**bc a**bb***bb*c a**bb***bb*bc

Metacharacters for searching

Metacharacters represent a character or symbol in InDesign. Metacharacters in the Text section of the Find/Change dialog box begin with a caret (^); metacharacters in the GREP section begin with a tilde (~) or backslash (\). You can type metacharacters in the Text tab or GREP tab of the Find/Change dialog box.

Save time fixing punctuation errors by saving search strings as queries.

Character:	Text tab metacharacter:	GREP tab metacharacter:
Tab Character	^t	\t
End of Paragraph	^p	\r
Forced Line Break	^n	\n
Any Page Number	^#	~#
Current Page Number	^N	~N
Next Page Number	^X	~X
Previous Page Number	^V	~V
* Any Variable	^v	~v
Section Marker	^x	~x
* Anchored Object Marker	^a	~a
* Footnote Reference Marker	^F	~F
* Index Marker	^I	~I
Bullet Character	^8	~8
Caret Character	^^	\^
Backslash Character	\	\\

Character:	Text tab metacharacter:	GREP tab metacharacter:
Copyright Symbol	^2	~2
Ellipsis	^e	~e
Tilde	~	\~
Paragraph Symbol	^7	~7
Registered Trademark Symbol	^r	~r
Section Symbol	^6	~6
Trademark Symbol	^d	~d
Open Parenthesis Character	(	\(
Close Parenthesis Character	)	\)
Open Brace Character	{	\{
Close Brace Character	}	\}
Open Bracket Character	[	\[
Close Bracket Character	]	\]
Em Dash	^_	~_
En Dash	^=	~=
Discretionary Hyphen	^-	~-
Nonbreaking Hyphen	^~	~~
Em Space	^m	~m
En Space	^>	~>
Third Space	^3	~3
Quarter Space	^4	~4
Sixth Space	^%	~%
Flush Space	^f	~f
Hair Space	^|	~|
Nonbreaking Space	^s	~s
Nonbreaking Space (fixed width)	^S	~S
Thin Space	^<	~<
Figure Space	^/	~/
Punctuation Space	^.	~.
^ Clipboard Contents, Formatted	^c	~c
^ Clipboard Contents, Unformatted	^C	~C
Any Double Quotation Mark	"	"
Any Single Quotation Mark	'	'
Straight Double Quotation Mark	^"	~"

Character:	Text tab metacharacter:	GREP tab metacharacter:
Double Left Quotation Mark	^{	~{
Double Right Quotation Mark	^}	~}
Straight Single Quotation Mark	^'	~'
Single Left Quotation Mark	^[	~[
Single Right Quotation Mark	^]	~]
Standard carriage return	^b	~b
Column Break	^M	~M
Frame Break	^R	~R
Page Break	^P	~P
Odd Page Break	^L	~L
Even Page Break	^E	~E
Discretionary Line Break	^k	~k
Right Indent Tab	^y	~y
Indent to Here	^i	~i
End Nested Style Here	^h	~h
Nonjoiner	^j	~j
* Running header (paragraph style) variable	^Y	~Y
* Running header (character style) variable	^Z	~Z
* Custom text variable	^u	~u
* Last page number variable	^T	~T
* Chapter number variable	^H	~H
* Creation date variable	^S	~S
* Modification date variable	^o	~o
* Output date variable	^D	~D
* File name variable	^l (lowercase L)	~l (lowercase L)
* Any Digit	^9	\d
* Any character that is not a digit		\D
* Any Letter	^$	[\l\u]
* Any Character	^?	. (inserts period in Change To)
* White Space (any space or tab)	^w	\s (Inserts space in Change To)
* Any character that is not a white space		\S
* Any word character		\w
* Any character that is not a word character		\W
* Any uppercase letter		\u

Character:	Text tab metacharacter:	GREP tab metacharacter:
* Any character that is not an uppercase letter		\U
* Any lowercase letter		\l
* Any character that is not a lowercase letter		\L
^ All Found Text		$0
Found Text 1-9		$1 (specifies the number of the grouping found, such as $3 for the third grouping; groupings are enclosed in parentheses)
* Kanji	^K	~K
* Beginning of Word		\<
* End of Word		\>
* Word Boundary		\b
* Opposite of Word Boundary		\B
* Beginning of Paragraph		^
* End of Paragraph [location]		$
* Zero or One Time		?
* Zero or More Times		*
* One or More Times		+
* Zero or One Time (Shortest Match)		??
* Zero or More Times (Shortest Match)		*?
* One or More Times (Shortest Match)		+?
* Marking Subexpression		( )
* Non-marking Subexpression		(?:)
* Character Set		[ ]
* Or		|
* Positive Lookbehind		(?<=)
* Negative Lookbehind		(?<!)
* Positive Lookahead		(?=)
* Negative Lookahead		(?!)
* Case-insensitive On		(?!)
* Case-insensitive Off		(?-!)
* Multiline On		(?m)
* Multiline Off		(?-m)
* Single-line On		(?s)
* Single-line Off		(?-s)
* Any alphanumeric character		[[:alnum:]]

Character:	Text tab metacharacter:	GREP tab metacharacter:
* Any alphabetic character		[[:alpha:]]
* Any blank character, either space or tab		[[:blank:]]
* Any control character		[[:control:]]
* Any graphical character		[[:graph:]]
* Any printable character		[[:print:]]
* Any punctuation character		[[:punct:]]
* Any character whose code is greater than 255 (applies only to the wide character traits classes)		[[:unicode:]]
* Any hexadecimal digit character 0-9, a-f, and A-F		[[:xdigit:]]
* Any character of a certain glyph set, such as a, à, á, â, ã, ä, å, A, À, Á, Â, Ã, Ä and Å		[[=a=]]

* Can be entered in the Find What box only, not the Change To box.

^ Can be entered in the Change To box, not the Find What box.

Find and change glyphs

The Glyph section of the Find/Change dialog box is especially useful for replacing glyphs that share the same unicode value with other similar glyphs, such as alternate glyphs.

1 Choose Edit > Find/Change.

2 At the bottom of the dialog box, specify a range from the Search menu, and click icons to determine whether items such as locked layers, master pages, and footnotes are included in the search.

3 Under Find Glyph, select the Font Family and Font Style in which the glyph is located.

The Font Family menu displays only those fonts that are applied to text in the current document. Fonts in unused styles do not appear.

4 Do one of the following to enter the glyph you want to find in the Glyph box:

- Click the button beside the Glyph box, and then double-click a glyph on the panel. This panel works like the Glyphs panel.
- Choose Unicode or GID/CID, and enter the code for the glyph.

You can use other methods to enter the glyph you want to find in the Glyph box. Select a glyph in the document window and choose Load Selected Glyph In Find from the context menu, or select a glyph in the Glyphs panel and choose Load Glyph In Find from the context menu.

5 Under Change Glyph, enter the replacement glyph by using the same techniques you use to enter the glyph you're searching for.

6 Click Find.

7 To continue searching, click Find Next, Change (to change the most recently found glyph), Change All (a message indicates the total number of changes), or Change/Find (to change the current occurrence and search for the next one).

8 Click Done.

Find and change fonts

Use the Find Font command to search for and list the fonts used throughout your document. You can then replace any fonts (except those in imported graphics) with any other fonts available on your system. You can even replace a font that's part of a text style. Note the following:

- A font name is listed once for its use in the layout and listed each time in imported graphics. For example, if you use the same font three times in the layout and three times in imported graphics, it will be listed in the Find Font dialog box four times—once for all layout instances, and three more times for each imported graphic. If fonts are not completely embedded in graphics, the font name may not be listed in the Find Font dialog box.
- Find Font is not available in a Story Editor window.
- The Find Font dialog box displays icons to indicate the kinds of fonts or font conditions, such as Type 1 fonts , imported images , TrueType fonts , OpenType fonts , and missing fonts .
- Use the Type > Find Font command to help ensure consistent output by analyzing font usage on pages and in imported graphics. To find and change specific text attributes, characters, or styles, use the Edit > Find/Change command instead.

1 Choose Type > Find Font.

2 Select one or more font names in the Fonts In Document list.

3 Do one of the following:

- To find the first occurrence in the layout of the font selected in the list, click Find First. The text using that font moves into view. The Find First button is unavailable if the selected font is used in an imported graphic or if you selected multiple fonts in the list.
- To select an imported graphic that uses a font marked in the list by an imported image icon , click Find Graphic. The graphic also moves into view. The Find Graphic button isn't available if the selected font is used only in the layout or if you selected multiple fonts in the Fonts In Document list.

4 To see details about a selected font, click More Info. To hide the details, click Less Info. The Info area is blank if you selected multiple fonts in the list.

A font may be listed as Unknown if the file of the selected graphic doesn't supply information about it. Fonts in bitmap graphics (such as TIFF images) won't appear in the list at all because they aren't true characters.

5 To replace a font, select the new font you want to use from the Replace With list, and do one of the following:

- To change just one occurrence of the selected font, click Change. This option is not available if multiple fonts are selected.
- To change the font in that occurrence, and then find the next instance, click Change/Find. This option is not available if multiple fonts are selected.
- To change all instances of the font selected in the list, click Change All. If you want any paragraph or character style that includes the font being searched for to be redefined, select Redefine Style When Changing All.

When there are no more occurrences of a font in your file, its name is removed from the Fonts In Document list.

Note: *To change fonts in imported graphics, use the program that originally exported the graphic, and then replace the graphic or update the link using the Links panel.*

6 If you clicked Change, click Find Next to locate the next instance of the font.

7 Click Done.

You can open the Find Font dialog box while preflighting a document. In the Preflight dialog box, switch to the Fonts tab and click Find Font.

To view the system folder in which a font appears, select the font in the Find Font dialog box and choose Reveal In Explorer (Windows) or Reveal In Finder (Mac OS).

Find/change items using queries

You can find and change text, objects, and glyphs by using or constructing a query. A *query* is a defined find-and-change operation. InDesign offers several preset queries for changing punctuation formats and other useful actions, such as changing telephone number formats. By saving a query you constructed, you can run it again and share it with others.

Search using queries

1 Choose Edit > Find/Change.

2 Choose a query from the Query list.

The queries are grouped by type.

3 Specify a range to search on the Search menu.

The search range is not stored with the query.

4 Click Find.

5 To continue searching, click Find Next, Change (to change the most recently found text or punctuation mark), Change All (a message indicates the total number of changes), or Change/Find (to change text or punctuation marks and continue your search).

After you select a search query, you can adjust the settings to fine-tune your search.

Save queries

Save a query in the Find/Change dialog box if you want to run it again or share it with others. The names of queries you save appear in the Query list in the Find/Change dialog box.

1 Choose Edit > Find/Change.

2 Select Text, GREP, or a different tab to undertake the search you want.

3 Below the Search menu, click icons to determine whether items such as locked layers, master pages, and footnotes are included in the search.

These items are included in the saved query. However the range of the search isn't saved with the query.

4 Define the Find What and Change To fields. (See "Metacharacters for searching" on page 117 and "Search using GREP expressions" on page 113.)

5 Click the Save button in the Find/Change dialog box and enter a name for the query.

If you use the name of an existing query, you are asked to replace it. Click Yes if you want to update the existing query.

Delete queries

❖ Select it on the Query list and click the Delete Query button.

Load queries

Customized queries are stored as XML files. The names of customized queries appear in the Query list in the Find/Change dialog box.

❖ To load a query that was given to you so that it appears in the Query list, copy the query file to the appropriate location:

Mac OS Users*[username]*\Library\Preferences\Adobe InCopy *[Version]**[Language]*\Find-Change Queries*[query type]*

Windows XP Documents and Settings*[username]*\Application Data\Adobe\InCopy *[Version]**[Language]*\Find-Change Queries*[query type]*

Windows Vista Users*[username]*\AppData\Roaming\Adobe\InCopy *[Version]**[Language]*\Find-Change Queries*[query type]*

Using text macros

Create a text macro

A *textmacro* is a shortcut for a sequence of keystrokes. A macro can be simple—it can type a word or phrase you use often—or it can be complex, such as a formatted address. A *macro code* is the name of the text macro you create. For example, instead of repeatedly typing "Centers for Disease Control and Prevention," you can create a macro code (such as "cdc") that changes to the full name.

1 Choose Window > Text Macros.

2 If you want to create a text macro from existing text, select the text in the document.

3 Choose New Macro from the Text Macros panel menu, or click the New Macro button in the Text Macros panel.

4 Enter a macro code in the Macro Code text box. Note that macro codes are case-sensitive.

The code appears in the Text Macros list.

5 For Macro Text, type the text string that you want entered when you activate the text macro.

6 To include text attributes from the existing text when inserting or swapping macro text, select Remember Text Attributes.

By default, inserted or swapped macro text uses the style attributes of the destination paragraph.

7 To assign a keyboard shortcut for activating the macro, place the cursor in the Macro Key Shortcut text box, and press the keys you want to use for the shortcut.

Shortcuts are especially useful if you turn off Automatically Swap Macro Text in the Text Macros panel.

If the keyboard shortcut you want to assign to the macro is already assigned to another function, the alert symbol appears at the bottom of the dialog box with the message "Currently Assigned To: *[function]*." If you choose to assign the keyboard shortcut to the macro, the previous keyboard shortcut function is overridden.

8 Click OK.

You can replace the macro code with macro text automatically while typing, by using a macro key shortcut, or by choosing Swap Macro Text from the Text Macros panel menu.

Edit a text macro

1 From the list in the Text Macros panel, double-click the text macro you want to edit, or select it and click the Edit Text Macro button in the Text Macros panel.

2 Enter your changes in the text box, and click OK.

Duplicate a macro

Use the Duplicate Macro command to create a copy of an existing macro. The duplicate macro is assigned the same code as the original, but with a number appended to it, and is listed immediately after the original macro in the Text Macros panel. For example, duplicating the macro "DOT" creates a copy of the macro, named "DOT1."

1 Select the text macro you want to duplicate from the list in the Text Macros panel.

2 Choose Duplicate Macro from the Text Macros panel menu.

Delete a text macro

1 Select the text macro you want to delete from the Text Macros panel list.

2 Choose Delete Macro from the Text Macros panel menu.

Important: *Once you delete a macro, you cannot undo the deletion.*

Insert or swap macro text

You can insert macro text in three different ways: Using the Insert Macro Text command to insert macro text at the insertion point, having macro text inserted automatically while typing, or swapping existing text with macro text.

Insert macro text automatically

If Automatically Swap Macro Text is selected, macro codes are automatically converted to macro text while you type. For example, if you created a macro code named "cdc," when you type **cdc** followed by a word-ending character such a space or period, Center for Disease Control and Prevention appears. The macro code is case-sensitive.

1 Make sure that Automatically Swap Macro Text from the Text Macros panel menu is selected. (A check mark should appear next to it.)

2 Type the macro code followed by a word-ending character (space, comma, period, or paragraph return).

If you want to restore the macro code text, choose Edit > Undo until the macro code reappears.

Insert macro text at the insertion point

The Insert Macro Text command places the selected macro text at the current text insertion point.

1 Using the Type tool T, click the location where you want to insert the macro text.

2 Do one of the following:

- Press the macro keyboard shortcut for the macro you want.
- Select the macro you want from the Text Macros panel, and choose Insert Macro Text from the panel menu, or click the Insert Macro Text button .

Swap text with macro text

The Swap Macro Text command searches the text immediately preceding the current text insertion point for any defined macro code (case-sensitive) and, if one is found, removes the macro code and replaces it with the associated macro text. For example, you have created a text macro for Centers for Disease Control and Prevention, and the macro code is CDC. To use the macro, type **The CDC**, and then with the text insertion point placed immediately following the macro code, choose Swap Macro Text. InCopy then searches the text immediately preceding the insertion point and replaces CDC with the macro text Centers for Disease Control and Prevention.

1 Using the Type tool T, click to the immediate right of the macro code that you want to replace, or select the text you want to replace.

2 Choose Swap Macro Text from the Text Macros panel menu, or choose Edit > Swap Macro Text.

Note: *The Swap Macro Text command does not continue to search the entire document for every occurrence of the macro code. To find and replace all instances of a word or phrase, use the Find/Change command.*

Text variables

Create and edit text variables

A *text variable* is an item you insert in your document that varies according to the context. For example, the Last Page Number variable displays the page number of the last page of the document. If you add or remove pages, the variable is updated accordingly.

InCopy includes several preset text variables that you can insert in your document. You can edit the format of these variables, or you can create your own. Some variables, such as Running Header and Chapter Number, are especially useful for adding to master pages to ensure consistent formatting and numbering. Other variables, such as Creation Date and File Name, are useful for adding to the slug area for printing.

Note: *Adding too much text to a variable may cause overset or compressed text. Variable text does not break across lines.*

Create or edit text variables

The options available for creating the variable depend on the type of variable you specify. For example, if you choose the Chapter Number type, you can specify text to appear both before and after the number, and you can specify the numbering style. You can create several different variables based on the same variable type. For example, you can create one variable that displays “Chapter 1” and another that displays “Ch. 1.”

Similarly, if you choose the Running Header type, you can specify which style is used as the basis for the header, and you can select options for deleting end punctuation and changing the case.

1 If you want to create text variables for use in all new documents you create, close all documents. Otherwise, the text variables you create appear only in the current document.

2 Choose Type > Text Variables > Define.

3 Click New, or select an existing variable and click Edit.

4 Type a name for the variable, such as “Full Chapter” or “Running Title.”

5 From the Type menu, choose a variable type, specify the options for that type, and then click OK.

Different options are available depending on the variable type you select.

Text Before / Text After For all variable types (except Custom Text), you can specify text that will be added before or after the variable. For example, you can add the word “of” before the Last Page Number variable and the phrase “total

pages" after the variable to create an "of 12 total pages" effect. You can also paste text into the boxes, but special characters such as tabs and auto page numbers are stripped out. To insert special characters, click the triangle to the right of the text box.

Style For all numbered variable types, you can specify the numbering style. If [Current Numbering Style] is selected, the variable uses the same numbering style selected in the document's Numbering & Section Options dialog box.

Variable types

Chapter Number

A variable created with the Chapter Number type inserts the chapter number. You can insert text before or after the chapter number, and you can specify a numbering style.

If the document's chapter number is set to continue from the previous document in the book, you may need to update the book's numbering in order for the appropriate chapter number to appear.

Creation Date, Modification Date, and Output Date

Creation Date inserts the date or time the document is first saved; Modification Date inserts the date or time the document was last saved to disk; Output Date inserts the date or time the document starts a print job, exports to PDF, or packages the document. You can insert text before and after the date, and you can modify the date format for all date variables.

Date Format You can type date formats directly into the Date Format box, or you can choose format options by clicking the triangle to the right of the box. For example, the date format "MM/dd/yy" displays as 12/22/07. By changing the format to "MMM. d, yyyy" the date will display as Dec. 22, 2007.

Date variables use the language applied to text. For example, the creation date may appear in Spanish text as "01 diciembre 2007" and in German as "01 Dezember 2007."

Abbreviation	Description	Example
M	Month number, no leading zero	8
MM	Month number, leading zero	08
MMM	Abbreviated month name	Aug
MMMM	Full month name	August
d	Day number, no leading zero	5
dd	Day number, leading zero	05
E	Weekday name, abbreviated	Fri
EEEE	Full weekday name	Friday
yy or YY	Year number, last two digits	07
y or YYYY	Full year number	2007
G or GGGG	Era, abbreviated or expanded	AD or Anno Domini
h	Hour, no leading zero	4
hh	Hour, leading zero	04
H	Hour, no leading zero, 24-hour format	16
HH	Hour, leading zero, 24-hour format	16

Abbreviation	Description	Example
m	Minute, no leading zero	7
mm	Minute leading zero	07
s	Second, no leading zero	7
ss	Second, leading zero	07
a	AM or PM, two characters	PM
z or zzzz	Time zone, abbreviated or expanded	PST or Pacific Standard Time

File Name

This variable inserts the name of the current file into the document. It's commonly added to the slug area of the document for printing or used in headers and footers. In addition to Text Before and Text After, you can choose the following options.

Include Entire Folder Path Select to include the full folder path with the file name. The standard path conventions for either Windows or Mac OS are used.

Include File Extension Select to include the file name extension.

The File Name variable is updated whenever you save the file with a new name or to a new location. The path or extension does not appear in the document until it's saved.

Last Page Number

The Last Page Number type is useful for adding the total number of pages in a document to headers and footers using the common "Page 3 of 12" format. In this case, the number 12 is generated by the Last Page Number, and it's updated whenever pages are added or removed. You can insert text before or after the last page number, and you can specify a numbering style. From the Scope menu, choose an option to determine whether the last page number in the section or document is used.

Note that the Last Page Number variable does not count the pages in the document.

Running Header (Paragraph or Character Style)

The Running Header variables insert the first or last occurrence on the page of the text to which the specified style is applied. If no text on the page is formatted with the specified style, the text from a previous page is used.

Custom Text

This variable is commonly used for inserting placeholder text, or a text string that may need to be changed quickly. For example, if you're working on a project that uses a code name for a company, you can create a custom text variable for the code name. When you are able to use the real company name, you can simply change the variable to update all the occurrences.

To insert special characters in a text variable, click the triangle to the right of the text box.

Create variables for running headers and footers

By default, the Running Header variables insert the first occurrence (on the page) of the text to which the specified style is applied.

1 If your content is not already formatted, create and apply the paragraph style or character style for the text you want to appear in the header (such as a title or heading style).

2 Choose Type > Text Variables > Define.

3 Click New, and then type a name for the variable.

4 From the Type menu, choose Running Header (Paragraph Style) or Running Header (Character Style).

5 Specify the following options:

Style Choose the style to display in your header or footer.

Use Decide whether you want the first or last occurrence of the style that's applied on the page. First On Page is defined as the first paragraph (or character) that begins on a page, not one that begins on a previous page and ends on the current page. If there is no occurrence of the style on the page, the previous occurrence of the applied style is used. If there is no previous occurrence in the document, the variable is empty.

Delete End Punctuation If selected, the variable displays the text minus any end punctuation (periods, colons, exclamation points, and question marks).

Change Case Select this option to change the case of the text that appears in the header or footer. For example, you may want to use sentence case in your footer, even though the heading on the page appears in title case.

6 Click OK, and then click Done in the Text Variables dialog box.

If a header or footer text frame has been created on the master page of the InDesign document, you can insert the variable in the header or footer. (See "Edit text on a master page" on page 97.)

Insert text variables

1 Place the insertion point where you want the variable to appear.

2 Choose Type > Text Variables > Insert Variable, and then choose the variable you want to insert.

The variable appears on the page as if you'd typed it in the document. For example, the Creation Date variable might appear as December 22, 2007. If you choose Type > Show Hidden Characters, the variable instance is surrounded by a box using the current layer color.

Delete, convert, and import text variables

Use the Text Variables dialog box to delete, convert, and import text variables.

Delete text variables

If you want to delete an instance of a text variable inserted in a document, simply select the variable and press Backspace or Delete. You can also delete the variable itself. When you do so, you can decide how to replace the variables inserted in the document.

1 Choose Type > Text Variables > Define.

2 Select the variable, and then click Delete.

3 Specify how the variable will be replaced by specifying a different variable, converting the variable instances to text, or deleting the variable instances altogether.

Convert text variables to text

- To convert a single instance, select the text variable in the document window, and then choose Type > Text Variables > Convert Variable To Text.
- To convert all instances of the text variable in the document, choose Type > Text Variables > Define, select the variable, and then click Convert To Text.

Import text variables from another document

1 Choose Type > Text Variables > Define.

2 Click Load, and then double-click the document that has the variables you want to import.

3 In the Load Text Variables dialog box, make sure that a check mark appears next to the variables you want to import. If any existing variable has the same name as one of the imported variables, choose one of the following options under Conflict With Existing Text Variable, and then click OK:

Use Incoming Definition Overwrites the existing variable with the loaded variable and applies its new attributes to all text in the current document that used the old variable. The definitions of the incoming and existing variables are displayed at the bottom of the Load Text Variables dialog box so that you can view a comparison.

Auto-Rename Renames the loaded variable.

4 Choose Done, and then click OK.

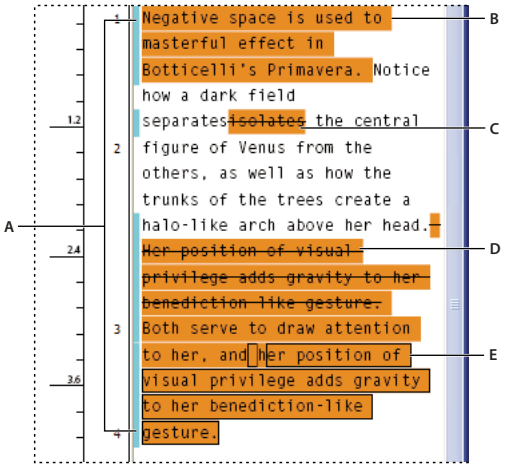
You can also copy variables to other documents when you synchronize a book file.

Tracking and reviewing changes

Track changes

One of the most valuable InCopy features is the ability to track changes made to a story by each contributor in the writing and editing process. Whenever anyone adds, deletes, or moves text within an existing story, the change is marked in Galley and Story views. You can see the date and time of each change in the Change Info panel, along with the contributor's name and type of change made.

Use the Track Changes toolbar in InCopy to turn Track Changes on or off and to show, hide, accept, or reject changes made by contributors. Contributors can also make annotations on the screen using the Notes command.



Change tracking shown in Galley view
A. *Change bars* ***B.*** *Added text* ***C.*** *Deleted text* ***D.*** *Moved text (from)* ***E.*** *Moved text (to)*

See also

"Using editorial notes" on page 134

Turn on change tracking

1 Do any of the following:

- Open the story you want to edit, and then choose Changes > Track Changes In Current Story. A check mark appears next to the option, indicating that it is active.
- Click the Track Changes in Current Story button in the Track Changes toolbar.
- To enable tracking in all open stories in a multistory document, choose Changes > Enable Tracking In All Stories.
- To change the default for new documents, close all documents, and then choose Changes > Track Changes In Current Story.

2 Add, delete, or move text within the story as needed.

Note: *When Track Changes is turned on, a track changes icon appears at the right end of the Story bar in Galley view and Story view.*

How change tracking is displayed

When Track Changes is turned on, each change is marked by default as follows in Galley and Story views:

Preference settings let you choose a color to identify your changes, as well as select which changes (adding, deleting, or moving text) you want tracked and the appearance of tracking. (See "Set Track Changes preferences" on page 133.)

Added text Highlighted.

Deleted text Highlighted and marked with a strikethrough.

Moved (cut-and-pasted) text Highlighted and marked with a strikethrough in its original location; highlighted and boxed in the new location.

Note: *If you cut text from one InCopy document and paste it into another, it is displayed as deleted text in the document of its original location and as added text in its new location.*

Copied text Highlighted in the new location. The original text is unchanged.

Change bars A change bar is a vertical line that appears to the left of a line of text that has been changed. You can choose whether to show or hide change bars as you work. You can also specify what color to use for displaying the change bars.

Show or hide changes

When changes are hidden, the text appears as it would with the change-tracking feature turned off. That is, added text is visible, deleted text is invisible, and moved or pasted text appears where it has been inserted.

When change-tracking is turned on, editing is tracked regardless of whether you work in Galley, Story, or Layout view. You can view changes only in the Galley and Story views, not the Layout view. Text edits in InDesign are also tracked although changes are visible only in InCopy.

❖ Do one of the following:

- Choose View > Show Changes or View > Hide Changes.
- Click the Show/Hide Changes button in the Track Changes toolbar.

Turn off change tracking

❖ Do any of the following:

- Choose Changes > Track Changes In Current Story. Track Changes is off when no check mark appears next to the option.

- Click the Track Changes In Current Story button in the Track Changes toolbar.
- To disable tracking in all open stories in a multistory document, choose Changes > Disable Tracking In All Stories.

Note: *If you disable tracking, no further changes will be tracked. Previously tracked changes will not be affected.*

View change information in the Change Info panel

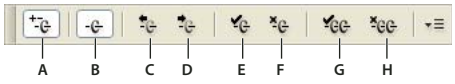
1 Choose Window > Change Info.

2 Click the insertion point in a change. The Change Info panel displays the date, time, and other change information.

Accept and reject changes

When changes have been made to a story, whether by you or by others, the change-tracking feature enables you to review all changes and decide whether to incorporate them into the story. You can accept or reject single changes, only portions of a tracked change, or all changes at once.

When you accept a change, it becomes a normal part of the text flow and is no longer highlighted as a change. When you reject a change, the text reverts to how it was before the change was made. To accept or reject tracked changes, you can use either the Changes menu or the Change buttons on the Track Changes toolbar.



Track Changes toolbar
A. *Enable/Disable Track Changes in Current Story* ***B.*** *Show/Hide Changes* ***C.*** *Previous Change* ***D.*** *Next Change* ***E.*** *Accept Change* ***F.*** *Reject Change* ***G.*** *Accept All Changes* ***H.*** *Reject All Changes*

Review changes using the toolbar

1 In Galley or Story view, position the insertion point at the beginning of the story.

2 Click the Next Change button .

3 Do one of the following:

- To accept the highlighted change and incorporate it into the text flow, click the Accept Change button .
- To reject the change and revert to the original text, click the Reject Change button .
- To move back to the previous change, click the Previous Change button .
- To skip over a change and move to the next one, click the Next Change button .

Note: *If you change your mind about accepting or rejecting a change, you can undo the change by choosing Edit > Undo or pressing Ctrl+Z (Windows) or Command+Z (Mac OS).*

Accept or reject a change

1 In Galley or Story view, click anywhere within the block of changed text.

2 To accept the change, do one of the following:

- Choose Changes > Accept Change.
- Click the Accept Change button on the Track Changes toolbar.

3 To reject the change, do one of the following:

- Choose Changes > Reject Change.
- Click the Reject Change button on the Track Changes toolbar.

Partially accept or reject a change

1 Using the Type tool T, select the portion of the text you want to accept.

2 To accept the selected portion of the change, do one of the following:

- Choose Changes > Accept Change.
- Click the Accept Change button on the Track Changes toolbar.

3 To reject the selected portion of the change, do one of the following:

- Choose Changes > Reject Change.
- Click the Reject Change button on the Track Changes toolbar.

Accept or reject all changes without reviewing

1 In Galley or Story view, click anywhere within the block of changed text.

2 Choose Changes > Accept All Changes or Reject All Changes.

3 In the message that appears asking whether you want to accept or reject all changes, click OK.

Choosing Accept All Changes or Reject All Changes also applies to hidden conditional text.

To display Accept All Changes and Reject All Changes buttons on the Track Changes toolbar, choose Customize from the toolbar menu, select Accept All/Reject All, and then click OK.

Set Track Changes preferences

Preference settings let you control many tracking options. You can choose a color to identify your changes and select what changes you want tracked: adding, deleting, or moving text. You can also set the appearance of each type of tracked change, and you can have changes identified with colored change bars in the margins.

1 Choose Edit > Preferences > Track Changes (Windows) or InCopy > Preferences > Track Changes (Mac OS).

2 Select each type of change that you want to track.

3 For each type of change, specify the text color, background color, and marking method.

By default, all three types of change use the text color and background user color. Deleted text is marked with a strikethrough, and moved text is marked with an outline. Added text is marked with the user color. (For information on changing the user color, see "Change the user name and color" on page 133.)

4 To show change bars, select the Change Bars option. Choose a color from the Change Bar Color menu, and specify whether you want change bars to appear in the left or right margin.

5 Select Include Deleted Text When Spellchecking if you want to spell-check text marked to be deleted.

This option affects only the spell-checking of deleted text in Galley View or Story View. You cannot find deleted text in Layout View.

6 Click OK.

Change the user name and color

1 Close all open stories.

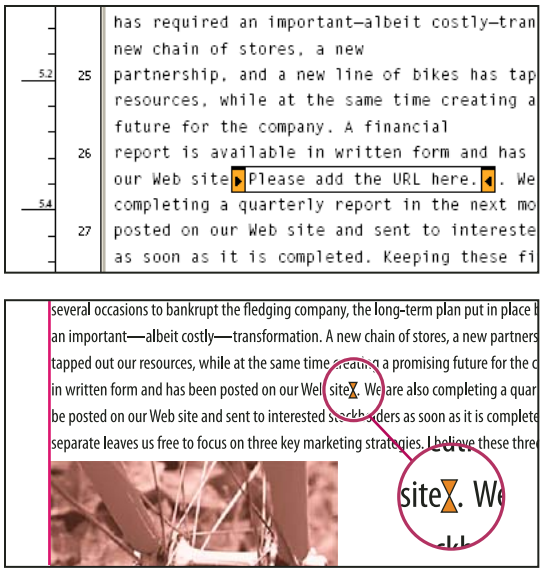
2 Choose File > User.

3 Specify the user name and color to be used for change-tracking and notes, and then click OK.

Using editorial notes

About editorial notes

Editorial notes are brief comments or annotations for yourself or other contributors. In Galley and Story views, all notes are displayed inline (within the text), and the content of the note is displayed between note bookends . In Layout view, each note is indicated by a note anchor . The content of the note is displayed in the Notes panel and can be color-coded for each user.



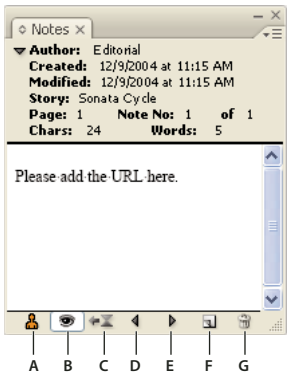
Note bookends shown in Galley view (left) and Note anchor shown in Layout view (right)

See also

"Specify note preferences" on page 138

Notes panel overview

The Notes panel contains the name of the note's author, the date and time it was last modified, the story label, the page number, the note number out of total notes, the number of characters and words, and the content of the note.



Notes panel
***A.** User color **B.** Show/Hide notes **C.** Go to note anchor **D.** Go to previous note **E.** Go to next note **F.** New note **G.** Delete note*

Note: *Regardless of which view you are using, the content of the Notes panel appears the same.*

See also

"Specify note preferences" on page 138

Open the Notes panel

❖ Do one of the following:

- Choose Window > Notes.
- In Layout view, choose Notes > New Note.

Use Notes Mode

Notes Mode is a convenient way to add, split, or delete notes, depending on where the insertion point is located or what text is selected.

1 Do any of the following:

- To create a new note, place the insertion point in text.
- To convert text to a note, select the text.
- To split a note, place the insertion point inside a note.
- To convert the note to text, select the note bookends (in Galley view or Story view).
- To move the insertion point out of a note, place the insertion point at the beginning or end of the note.

2 Choose Notes > Notes Mode.

See also

"Keys for working with text" on page 279

Add a note

1 Do either of the following:

- Using the Type tool T, click where you want to place the note, and choose Notes > New Note.
- Using the Note tool, click where you want to place the note.

Adding a note in Layout view opens the Notes panel if it is not already open.

2 In Galley or Story view, type your note between the note bookends. In Layout view, type your note in the Notes panel.

You can add as many notes as you want in any location. However, you cannot create a note within another note.

You can also add a note using Notes Mode.

Convert text to a note

1 Select the text that you want to move into a new note.

2 Choose Notes > Convert To Note.

A new note is created. The selected text is removed from the body of the story and pasted into the new note. The note anchor or bookend is located where the text you selected was cut.

If you add notes to a linked InCopy story, they also appear in the story in InDesign, and can be edited in InDesign.

You can also convert text to a note using Notes Mode.

You can assign keyboard shortcuts to convert a word, line, paragraph, or story to a note. Choose Edit > Keyboard Shortcuts, and then choose Notes Menu from the Product Area menu. Add a shortcut to the command, and then click OK.

Convert notes to text

1 Open the Notes panel.

2 Select the text in the Notes panel that you want to add to the text of the document. Or, in Galley view, select the text in the inline note.

3 Choose Notes > Convert To Text.

You can also convert notes to text using Notes Mode.

Note: *If you select only a portion of the note contents when you convert the contents to text, the original note will be divided into two separate notes, and the portion of the note contents that is converted to text will appear between the two new notes.*

Navigate between notes

When you navigate through notes, the active text insertion point moves from the current note anchor to the anchor of the next or previous note. When navigating between notes in Layout view, click the Go to Note Anchor button to view the note anchor associated with the note displayed in the Notes panel.

1 Click anywhere within the contents of a story.

2 Do one of the following:

- Choose Notes > Previous Note or Notes > Next Note.
- Select Previous Note or Next Note from the Notes panel menu.
- Click the Go To Previous Note button or the Go To Next Note button in the Notes panel.

Note: *In the Galley and Story views, you can use the Find/Change command to locate a note. The Notes section of the Preferences dialog box contains a setting to include notes in Find/Change searches.*

Split a note

1 In the Notes panel or in the note itself, place the insertion point where you want to split the note.

You cannot split a note if the insertion point is at the beginning or end of the note, or if the note is empty.

2 Do one of the following:

- Choose Notes > Split Note.
- Choose Split Note from the Notes panel menu. The active text insertion point is placed between the two split notes.

You can also split a note using Notes Mode.

Expand or collapse notes

When expanded, the content of the note appears between the bookends. As you enter the content of the note, the bookends move apart to accommodate the text. You can collapse the bookends to hide the content of the note.

1 Select the Type tool T , and then click the begin-note bookend or the end-note bookend .

2 If the insertion point is in a note container, choose Notes > Collapse Note.

To expand or collapse all notes in the active story, choose Notes > Expand/Collapse Notes In Story.

Select and open a note in Layout view

A note anchor marks the location of a note in Layout view. The Notes panel displays the contents of the note, along with specific information about the note.

1 Select the Type tool T or Note tool .

2 Move the pointer over the note anchor until the pointer appears as a pointing hand.

3 Do one of the following:

- Click the note anchor.
- Choose Notes > Previous Note or Notes > Next Note.

Edit a note

- In Galley view or Story view, select the Type tool T , and then click between the bookends of the note you want to edit, and make your changes.
- In Layout View, select the Type tool T , click the note anchor to open the note in the Notes panel, and make your changes.

Check spelling or find/change text in notes

1 Select the Galley or Story view tab.

2 Expand the notes you want to spell-check or search. Choose Notes > Expand/Collapse Notes In Story to expand all notes.

3 Choose Edit > Spelling > Check Spelling or Edit > Find/Change.

Note: *If you choose Change All while spell-checking or finding text, text in collapsed notes is ignored in Galley View or Story View, but all occurrences of the text are replaced in Layout View.*

Move or duplicate notes

You can move or duplicate notes.

Move or duplicate notes in Galley and Story views

1 Shift+Alt-click (Windows) or Shift+Option-click (Mac OS) the start-note or end-note bookend to select the note.

2 Do one of the following:

- Drag the selected note to move it.
- Shift-drag the selected note to duplicate it.

Duplicate a note anchor in Layout view

❖ Do one of the following:

- Using the Type tool T, drag across the note anchor to highlight it, and then choose Edit > Copy. Paste it in a different location.
- Using the Note tool or Type tool, hold down Shift, and drag the anchor to where you want to place it in the text.

Delete notes

- To delete a single note, Shift+Alt-click (Windows) or Shift+Option-click (Mac OS) the start-note or end-note bookend to select the note, and then choose Notes > Delete Note.
- To delete all notes in the active story, choose Notes > Remove Notes From Story.
- To delete all notes in the document, choose Notes > Remove All Notes.

Printing and exporting notes

When you print an InCopy document, you can print any notes that are included in the document at the same time. You can also export notes from InCopy as PDF annotations.

See also

"Printing" on page 249

"Exporting to Adobe PDF" on page 255

Specify note preferences

Preferences settings let you set the color for note anchors, bookends, and backgrounds when inline in the Galley and Story views. You can also choose to display note info as a tool tip, as well as choose whether to include note content in Find/Change operations and spell checking in the Galley and Story views.

1. Choose Edit > Preferences > Notes (Windows) or InCopy > Preferences > Notes (Mac OS).
2. Select a color for note anchors and note bookends from the Note Color menu. Select [User Color] to use the color specified in the User dialog box. This is especially useful if more than one person is working on the file.
3. Select Show Note Tool Tips to display note information and some or all of the note content as a tool tip when the mouse pointer hovers over a note anchor in Layout view or a note bookend in Galley or Story view.
4. Specify whether you want to include inline note content when using the Find/Change and Spell Check commands (in Galley and Story views only).

Note: *In Layout view, you cannot use the Find/Change and Spell Check commands to search for the contents of notes, regardless of the settings in the Preferences dialog box. However, Change All does edit the contents of notes.*

5. Select either [None] or [Note Color] (the color you chose in step 2) to use for the background color of an inline note.
6. Click OK.

See also

"Change the user name and color" on page 133

Footnotes

Create footnotes

A *footnote* consists of two linked parts: the footnote reference number that appears in text, and the footnote text that appears at the bottom of the column. You can create footnotes or import them from Word or RTF documents. Footnotes are automatically numbered as they are added to a document. Numbering restarts in each story. You can control the numbering style, appearance, and layout of footnotes. You cannot add footnotes to tables or to footnote text.

The width of the footnote text is based on the width of the column containing the footnote reference marker. Footnotes cannot space columns in a text frame.

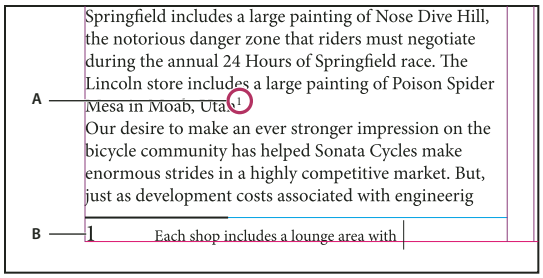
You cannot create endnotes in InDesign. Endnotes in converted Microsoft Word documents are formatted as text, not footnoes.

For a video tutorial on creating footnotes, see www.adobe.com/go/vid0218.

1 Place the insertion point where you want the footnote reference number to appear.

2 Choose Type > Insert Footnote.

3 Type the footnote text.



Footnote added to document
A. *Reference number* ***B.*** *Footnote text*

As you type in Layout view, the footnote area expands while the text frame remains the same size. The footnote area continues to expand upward until it reaches the line with the footnote reference. At that point, the footnote is split to the next page, if possible. If the footnote cannot be split, and if more text is added than can fit in the footnote area, the line containing the footnote reference is moved to the next page, or an overset icon appears. In such a case, you should considering changing the text formatting.

When the insertion point is in a footnote, you can choose Type > Go To Footnote Reference to return to where you were typing. If you use this option frequently, consider creating a keyboard shortcut.

See also

"Place (import) text" on page 91

Creating Footnotes video

Change footnote numbering and layout

Changes you make to footnote numbering and layout affect existing footnotes and all new ones.

Note: *In InCopy, change footnote numbering and layout options only for standalone documents. The InDesign document's footnote settings will override any changes you make to a linked (managed) file in InCopy.*

1 Choose Type > Document Footnote Options.
2 In the Numbering And Formatting tab, select options that determine the numbering scheme and formatting appearance of the reference number and footnote text.
3 Click the Layout tab, and select options that control the look of the footnote section on the page.
4 Click OK.

Footnote numbering and formatting options

The following options appear in the Numbering And Formatting section of the Footnote Options dialog box:

Numbering Style Choose the numbering style for footnote reference numbers.

Start At Specify the number used for the first footnote in the story. Each story in a document begins with the same Start At number. If you have multiple documents in a book with continued page numbering, you may want to start the footnote numbering in each chapter to continue where the last chapter left off.

The Start At option is especially useful for documents in a book. Footnote numbering is not continued across documents in a book.

Restart Numbering Every If you want numbering to restart within the document, select this option and choose Page, Spread, or Section to determine when footnote numbering is restarted. Some numbering styles, such as asterisks (*), work best when reset every page.

Show Prefix/Suffix In Select this option to show prefixes or suffixes in the footnote reference, the footnote text, or both. Prefixes appear before the number (such as [1) and suffixes appear after the number (such as 1]). This option is especially useful for placing footnotes within characters, such as [1]. Type a character or characters or select an option for Prefix, Suffix, or both. To select special characters, click the icons next to the Prefix and Suffix controls to display a menu.

If you think the footnote reference number is too close to the preceding text, adding one of the space characters as a prefix might improve the appearance. You can also apply a character style to the reference number.

Position This option determines the appearance of the footnote reference number, which is superscript by default. If you prefer to format the number using a character style (such as a character style that includes OpenType superscript settings), choose Apply Normal, and specify the character style.

Character Style You may want to choose a character style to format the footnote reference number. For example, instead of using superscript, you might want to use a character style at a normal position with an elevated baseline. The menu displays the character styles available in the Character Styles panel.

Paragraph Style You may want to choose a paragraph style that formats the footnote text for all footnotes in the document. The menu displays the paragraph styles available in the Paragraph Styles panel. By default, the [Basic Paragraph] style is used. Note that the [Basic Paragraph] style may not have the same appearance as the default font settings for the document.

Separator The separator determines the white space that appears between the footnote number and the start of the footnote text. To change the separator, first select or delete the existing separator, and then choose a new separator. You can include multiple characters. To insert white space characters, use the appropriate metacharacter, such as ^m for em space.

Footnote layout options

The following options appear in the Layout section of the Footnote Options dialog box:

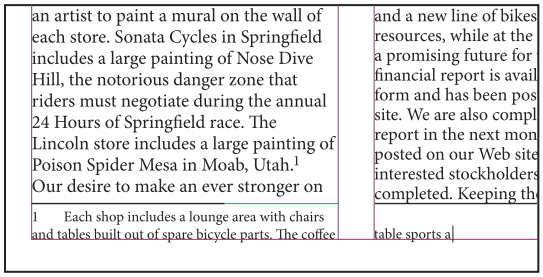
Minimum Space Before First Footnote This option determines the minimum amount of space between the bottom of the column and the first footnote line. You cannot use a negative value. Any Space Before setting in the footnote paragraph is ignored.

Space Between Footnotes This option determines the distance between the last paragraph of one footnote and the first paragraph of the next footnote in a column. You cannot use a negative value. The Space Before/Space After values in a footnote's paragraph apply only if the footnote includes multiple paragraphs.

First Baseline Offset This option determines the distance between the start of the footnote area (where the footnote divider appears by default) and the first line of footnote text.

Place End Of Story Footnotes At Bottom Of Text Select this option if you want the last column's footnotes to appear just below the text in the last frame of the story. If this option is not selected, any footnote in the last frame of the story appears at the bottom of the column.

Allow Split Footnotes Select this option if you want footnotes to break across a column when the footnote exceeds the amount of space available for it in that column. If splitting is not allowed, the line containing the footnote reference number moves to the next column, or the text becomes overset.



Footnote split across column.

If Allow Split Footnotes is turned on, you can still prevent an individual footnote from splitting by placing the insertion point in the footnote text, choosing Keep Options from the Paragraph panel menu, and selecting the Keep Lines Together and All Lines In Paragraph options. If the footnote contains multiple paragraphs, use the Keep With Next X Lines option in the first paragraph of the footnote text. You can choose Type > Insert Break Character > Column Break to control where the footnote is split.

Rule Above Specify the location and appearance of the footnote divider line that appears above the footnote text and the divider line that appears above any footnote text continued in a separate frame. The options you select apply to either the First Footnote In Column or Continued Footnotes, whichever is selected in the menu. These options are similar to those that appear when you specify a paragraph rule. If you don't want a rule to appear, deselect Rule On.

Delete footnotes

❖ To delete a footnote, select the footnote reference number that appears in text, and then press Backspace or Delete. If you delete only the footnote text, the footnote reference number and footnote structure remain.

Work with footnote text

As you edit footnote text, note the following:

- When the insertion point is in footnote text, choosing Edit > Select All selects all the footnote text for that footnote, but no other footnote or text.

- Use the arrow keys to navigate among footnotes.
- In Galley view or Story view, you can click the footnote icon to expand or collapse footnotes. You can expand or collapse all footnotes by right-clicking (Windows) or Ctrl-clicking (Mac OS) a footnote and choosing Expand All Footnotes or Collapse All Footnotes.
- You can select and apply character and paragraph formatting to footnote text. You can also select and change the appearance of the footnote reference number, but the recommended method is using the Document Footnote Options dialog box.
- When you cut or copy text that includes the footnote reference number, the footnote text is also added to the clipboard. If you copy the text to a different document, the footnotes in that text use the characteristics of the new document's numbering and layout appearance.
- If you accidentally delete the footnote number at the start of the footnote text, you can add it back by placing the insertion point at the beginning of the footnote text, right-clicking (Windows) or Control-clicking (Mac OS), and choosing Insert Special Character > Markers > Footnote Number.
- Text wrap has no effect on footnote text.
- If you clear overrides and character styles on a paragraph that includes a footnote reference marker, the footnote reference numbers lose the attributes you applied in the Document Footnote Options dialog box.

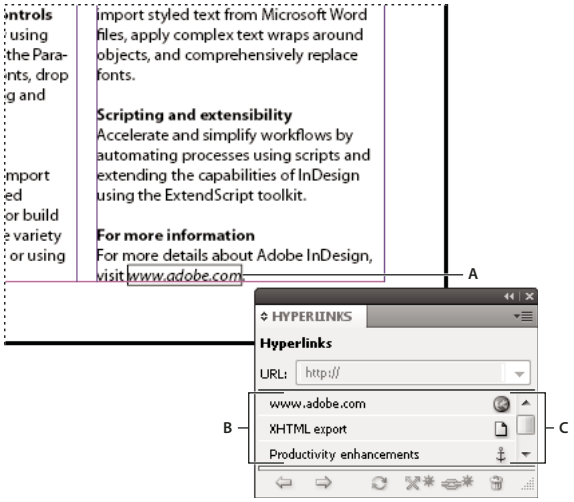
Hyperlinks

Hyperlinks panel overview

You can create hyperlinks so that when you export to Adobe PDF or SWF in InDesign, a viewer can click a link to jump to other locations in the same document, to other documents, or to websites. Hyperlinks you export to PDF or SWF in InCopy are not active.

A *source* is hyperlinked text or a hyperlinked graphic. A *destination* is the URL, file, email address, page, text anchor, or shared destination to which a hyperlink jumps. A source can jump to only one destination, but any number of sources can jump to the same destination.

Note: *If you want the source text to be generated from the destination text, insert a cross-reference instead of adding a hyperlink. See* *"Cross-references" on page 148.*



Hyperlinks
A. *Hyperlink source* ***B.*** *List of hyperlinks in the current document* ***C.*** *Hyperlink status icons*

Open the Hyperlinks panel

- Choose Window > Hyperlinks.
- Choose Window > Type & Tables > Cross-References.

Sort hyperlinks in the Hyperlinks panel

❖ Choose Sort from the Hyperlinks panel menu, and then choose any of the following:

Manually Displays the hyperlinks in the order in which they were added to the document.

By Name Displays the hyperlinks in alphabetical order.

By Type Displays the hyperlinks in groups of similar type.

Display hyperlinks in smaller rows

❖ Choose Small Panel Rows from the Hyperlinks panel menu.

Create hyperlinks

You can create hyperlinks to pages, URLs, text anchors, email addresses, and files. If you create a hyperlink to a page or text anchor in a different document, make sure that the exported files appear in the same folder.

To show or hide hyperlinks, choose View > Show Hyperlinks or Hide Hyperlinks.

Note: *Hyperlinks are included in exported Adobe PDF files if Hyperlinks is selected in the Export Adobe PDF dialog box in InDesign. Hyperlinks are included in the exported SWF file if Include Hyperlinks is selected in the Export SWF dialog box.*

See also

"Cross-references" on page 148

Create a hyperlink to a web page (URL)

You can use several different methods to create hyperlinks to URLs. When you specify a URL, you can use any valid Internet resource protocol: http://, file://, ftp://, or mailto://.

You can also use the Buttons feature to link to web pages. (See Buttons.)

You may want to create a character style for hyperlinks. Hyperlinks are often formatted in underlined blue text.

1 Select the text, frame, or graphic you want to be the hyperlink's source. For example, you can select the text, "See the Adobe website."

2 In the Hyperlinks panel, use any of the following methods to create a hyperlink to a URL:

- In the URL text box, type or paste the URL name (such as http://www.adobe.com), and then choose New Hyperlink from the Hyperlinks panel. Choose URL from the Link To menu, specify appearance options, and click OK.
- If a URL is selected in your document, choose New Hyperlink From URL in the Hyperlinks panel menu. Double-click the hyperlink in the Hyperlinks panel, and then choose URL from the Link To menu, specify appearance options, and click OK.
- Select a previously added URL from the URL menu. The hyperlink appearance is the same as that used in the previous URL.
- Choose New Hyperlink in the Hyperlinks panel menu. Choose URL from the Link To menu, specify appearance options, and click OK.

Note: *If a URL hyperlink isn't working in the exported PDF, there may be a problem with the hyperlink being a "Shared Destination." Double-click the hyperlink in the Hyperlinks panel, choose URL from the Link To menu, deselect Shared Hyperlink Destination, and click OK.*

Create a hyperlink to a file

When you create a hyperlink to a file, clicking the hyperlink in the exported PDF or SWF file opens the file in its native application, such as Microsoft Word for .doc files.

Make sure the file you specify is available to anyone opening the PDF or SWF file you export. For example, if you're sending the exported PDF to a coworker, specify a file located on a shared server rather than your hard drive.

1 Select the text, frame, or graphic you want to be the source of the hyperlink.

2 Choose New Hyperlink in the Hyperlinks panel menu, or click the Create New Hyperlink button at the bottom of the Hyperlinks panel.

3 In the New Hyperlink dialog box, choose File from the Link To menu.

4 For Path, type the pathname or click the folder button to locate and double-click the filename.

5 Select Shared Hyperlink Destination if you want the email message to be stored in the Hyperlinks panel for easy reuse.

6 Specify the appearance of the hyperlink source, and then click OK.

Create a hyperlink to an email message

1 Select the text, frame, or graphic you want to be the source of the hyperlink.

2 Choose New Hyperlink in the Hyperlinks panel menu, or click the Create New Hyperlink button at the bottom of the Hyperlinks panel.

3 In the New Hyperlink dialog box, choose Email from the Link To menu.

4 For Address, type the email address, such as **username@company.com**.

5 For Subject Line, type the text that appears in the subject line of the email message.

6 Select Shared Hyperlink Destination if you want the email message to be stored in the Hyperlinks panel for easy reuse.

7 Specify the appearance of the hyperlink source, and then click OK.

Create a hyperlink to a page

You can create a hyperlink to a page without first creating a destination. However, by creating a page destination, you can specify a page number and view setting.

1 Select the text, frame, or graphic you want to be the source of the hyperlink.

2 Choose New Hyperlink in the Hyperlinks panel menu, or click the Create New Hyperlink button at the bottom of the Hyperlinks panel.

3 In the New Hyperlink dialog box, choose Page from the Link To menu.

4 For Document, select the document containing the destination that you want to jump to. All open documents that have been saved are listed in the pop-up menu. If the document you're looking for isn't open, select Browse in the pop-up menu, locate the file, and then click Open.

5 For Page, specify the page number you want to jump to.

6 For Zoom Setting, do one of the following to select the view state of the page being jumped to:

- Select Fixed to display the magnification level and page position that were in effect when you created the link.
- Select Fit View to display the visible portion of the current page as the destination.
- Select Fit In Window to display the current page in the destination window.
- Select Fit Width or Fit Height to display the width or height of the current page in the destination window.
- Select Fit Visible to display the page so that its text and graphics fit the width of the window, which usually means that the margins are not displayed.
- Select Inherit Zoom to display the destination window at the magnification level the reader uses when the hyperlink is clicked.

7 Specify appearance options, and then click OK.

Create a hyperlink destination

Creating a hyperlink destination is necessary only if you're creating a hyperlink or cross-reference to a *text anchor*. A text anchor can point to a selection of text or to the insertion point location. Then you create the hyperlink or cross-reference that points to the hyperlink destination. You can also create hyperlink destinations for pages and URLs, but a destination isn't necessary for those links.

Hyperlink destinations you create do not appear in the Hyperlinks panel; they appear in the dialog box that appears when you're creating or editing hyperlinks.

1 If you're creating a text anchor, use the Type tool to place the insertion point, or select the range of text that you want to be the anchor.

You cannot set up an anchor destination for text on a master page.

2 Choose New Hyperlink Destination in the Hyperlinks panel menu.

3 Choose Text Anchor in the Type menu. Specify a name for the text anchor, and then click OK.

Create a hyperlink to a text anchor

1 Select the text, frame, or graphic you want to be the source of the hyperlink.

2 Choose New Hyperlink in the Hyperlinks panel menu, or click the Create New Hyperlink button at the bottom of the Hyperlinks panel.

3 Choose Text Anchor from the Link To menu.

4 For Document, select the document containing the destination that you want to jump to. All open documents that have been saved are listed in the pop-up menu. If the document you're looking for isn't open, select Browse in the pop-up menu, locate the file, and then click Open.

5 From the Text Anchor menu, choose the text anchor destination you created.

6 Specify hyperlink appearance options, and then click OK.

Create a hyperlink to any shared destination

While creating a hyperlink, if you choose Shared Destination from the Link To menu, you can specify any named destination. A destination is named when you add a URL using the URL text box or when you select Shared Hyperlink Destination while creating a hyperlink to a URL, file, or email address.

1 Select the text, frame, or graphic you want to be the source of the hyperlink.

2 Choose New Hyperlink in the Hyperlinks panel menu, or click the Create New Hyperlink button at the bottom of the Hyperlinks panel.

3 In the New Hyperlink dialog box, choose Shared Destination from the Link To menu.

4 For Document, select the document containing the destination that you want to jump to. All open documents that have been saved are listed in the pop-up menu. If the document you're looking for isn't open, select Browse in the pop-up menu, locate the file, and then click Open.

5 Choose a destination from the Name menu.

6 Specify hyperlink appearance options, and then click OK.

Hyperlink appearance options

The options determine the appearance of the hyperlink or cross-reference source in the exported PDF or SWF file. These appearance options are also displayed in the InDesign document if you choose View > Show Hyperlinks.

Character Style Choose a character style to apply to the hyperlink source. The Character Style option is available only if the hyperlink source is selected text, not a selected frame or graphic.

If you're inserting a cross-reference, you can apply a character style when you edit a cross-reference format. You can also apply character styles to building blocks within a format. See "Using cross-reference formats" on page 149.

Type Select Visible Rectangle or Invisible Rectangle.

Highlight Select Invert, Outline, Inset, or None. These options determine the appearance of the hyperlink when it's being clicked in the PDF or SWF file.

Color Select a color for the visible hyperlink rectangle.

Width Select Thin, Medium, or Thick to determine the thickness of the hyperlink rectangle.

Style Select Solid or Dashed to determine the appearance of the hyperlink rectangle.

Manage hyperlinks

Use the Hyperlinks panel to edit, delete, reset, or locate hyperlinks. In InCopy, you can manage hyperlinks only if the story is checked out for editing.

Edit hyperlinks

1 In the Hyperlinks panel, double-click the item you want to edit.

2 In the Edit Hyperlinks dialog box, make changes to the hyperlink as necessary, and then click OK.

Note: *To edit a hyperlink to a URL, select the hyperlink, edit the URL in the URL text box, and then press Tab or Enter.*

Delete hyperlinks

When you remove a hyperlink, the source text or graphic remains.

❖ Select the item or items you want to remove in the Hyperlinks panel, and then click the Delete button at the bottom of the panel.

Rename a hyperlink source

Renaming the hyperlink source changes the way it appears in the Hyperlinks panel.

1 In the Hyperlinks panel, select the hyperlink.

2 Choose Rename Hyperlink from the Hyperlinks panel menu, and specify a new name.

Edit or delete hyperlink destinations

1 Open the document in which the destination appears.

2 Choose Hyperlink Destination Options in the Hyperlinks panel menu.

3 For Destination, select the name of the destination you want to edit.

4 Do one of the following:

- Click Edit, and then make changes to the destination as necessary.
- Click Delete to remove the destination.

5 When you have finished editing or deleting destinations, click OK.

Reset or update hyperlinks

1 Select the range of text, the text frame, or the graphic frame that will act as the new hyperlink source. For example, you may want to select additional text to include in the source.

2 Select the hyperlink in the Hyperlinks panel.

3 Do either of the following:

- Choose Reset Hyperlink in the Hyperlinks panel menu.
- To update hyperlinks to external documents, choose Update Hyperlink in the Hyperlinks panel menu.

Go to a hyperlink source or anchor

- To locate the source of a hyperlink or cross-reference, select the item you want to locate in the Hyperlinks panel. Choose Go To Source in the Hyperlinks panel menu. The text or frame will be selected.
- To locate the destination of a hyperlink or cross-reference, select the item you want to locate in the Hyperlinks panel. Choose Go To Destination in the Hyperlinks panel menu.

If the item is a URL destination, InDesign starts or switches to your web browser to display the destination. If the item is a text anchor or page destination, InDesign jumps to that location.

Cross-references

If you're writing a manual or reference document, you may want to include a cross-reference to refer the reader from one part of your document to another. Example: **For more information, see "Field mice" on page 249.** You can specify whether a cross-reference derives from a paragraph style, such as a heading style, or from a text anchor you've created. You can also determine the cross-reference format, such as Page Number Only or Full Paragraph & Page Number.

Insert cross-references

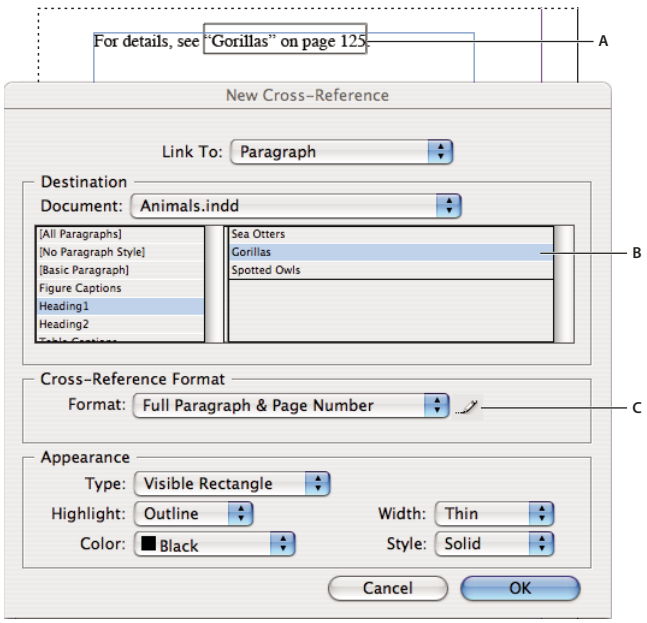
Use the Hyperlinks panel to insert cross-references into your document. The text being referred to is the *destination text*. The text that is generated from the destination text is the *source cross-reference*.

When you insert a cross-reference in your document, you can choose from several predesigned formats, or you can create your own custom format. You can apply a character style to the entire cross-reference source, or to text within the cross-reference. Cross-reference formats can be synchronized across a book.

Cross-reference source text is editable and can break across lines.

Note: *Cross-references are included in exported Adobe PDF files if Hyperlinks is selected in the Export Adobe PDF dialog box in InDesign. Cross-references are included in the exported SWF file if Include Hyperlinks is selected in the Export SWF dialog box.*

In InCopy standalone documents, you can create and edit cross-references as you can in InDesign. In checked-out stories, you can create and edit cross-references to paragraphs in the same story as the source, to paragraphs in another checked-out story if the InDesign document is open, or to text anchors in any story of any InDesign document.



Inserting cross-references
A. *Cross-reference source in document* ***B.*** *Selected destination paragraph* ***C.*** *Click here to create or edit cross-reference format.*

For a video tutorial on inserting cross-references, see www.adobe.com/go/lrvid4024_id.

1 Place the insertion point where you want the cross-reference to be inserted.

2 Do any of the following:

- Choose Type > Hyperlinks & Cross-References > Insert Cross-Reference.
- Choose Window > Type & Tables > Cross-References, and then choose Insert Cross-Reference from the Hyperlinks panel menu.
- Click the Create New Cross-Reference button in the Hyperlinks panel.

3 In the New Cross-Reference dialog box, choose Paragraph or Text Anchor from the Link To menu.

If you choose Paragraph, you can create a cross-reference to any paragraph in the document you specify.

If you choose Text Anchor, you can create a cross-reference to any text in which you have created a hyperlink destination. (See "Create a hyperlink destination" on page 145.) Creating a text anchor is especially useful if you want to use different text than the actual destination paragraph.

4 For Document, select the document containing the destination that you want to refer to. All open documents that have been saved are listed in the pop-up menu. If the document you're looking for isn't open, choose Browse, locate the file, and then click Open.

5 Click a paragraph style (such as Head1) in the left box to narrow down the choices, and then select the paragraph you want to refer to. (Or, if Text Anchor is selected, choose the text anchor.)

6 Choose the cross-reference format you want to use from the Format menu.

You can edit these cross-reference formats or create your own. See "Using cross-reference formats" on page 149.

7 Specify the appearance of the source hyperlink. See "Hyperlink appearance options" on page 146.

8 Click OK.

When you insert a cross-reference, a text anchor marker appears at the beginning of the destination paragraph. You can view this marker when you choose Type > Show Hidden Characters. If this marker is moved or deleted, the cross-reference becomes unresolved.

Using cross-reference formats

Several cross-reference formats appear in the New Cross-Reference dialog box by default. You can edit these formats, delete them, or create your own.

Note: *If you've deleted or edited cross-reference formats in your document and want to return them to the default formats, you can choose Load Cross-Reference Formats from the panel menu and choose a document with unedited formats. You can also synchronize cross-reference formats in a book.*

For a video tutorial on editing cross-reference formats, see www.adobe.com/go/lrvid4024_id.

Create or edit cross-reference formats

Unlike other presets, cross-reference formats can be edited or deleted. When you edit a cross-reference format, any source cross-reference that uses that format is automatically updated.

In InCopy, you can create or edit cross-reference formats only in stand-alone documents. In assignment files, the cross-reference formats are determined by the InDesign document.

1 Do any of the following:

- Choose Define Cross-Reference Formats from the Hyperlinks panel menu.
- While creating or editing a cross-reference, click the Create Or Edit Cross-Reference Formats button .

2 In the Cross-Reference Formats dialog box, do one of the following:

- To edit a format, select the format on the left.
- To create a format, select a format to base the new format on, and then click the Create Format button . This creates a duplicate of the selected format.

3 For Name, specify the name of the format.

4 In the Definition text box, add or remove any text as needed. Click the Building Block icon to insert building blocks from a menu. Click the Special Characters icon to select dashes, spaces, quotation marks, and other special characters.

5 To apply a character style to the entire cross-reference, select Character Style For Cross-Reference, and then choose or create the character style from the menu.

You can also use the Character Style building block to apply a character style to text within the cross-reference.

6 Click Save to save the changes. Click OK when finished.

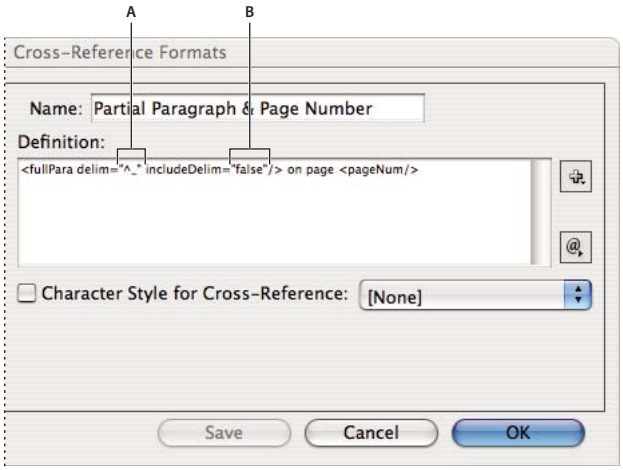
Cross-reference building blocks

Building block	What it does	Example
Page Number	Inserts the page number.	on page <pageNum/> on page 23
Paragraph Number	Inserts the paragraph number in a cross-reference to a numbered list.	See <paraNum/> See 1 In this example, only "1" is used from the paragraph, "1. Animals."
Paragraph Text	Inserts the paragraph text without the paragraph number in a cross-reference to a numbered list.	See "<paraText/>" See "Animals" In this example, only "Animals" is used from the paragraph, "1. Animals."
Full Paragraph	Inserts the entire paragraph, including paragraph number and paragraph text.	See "<fullPara/>" See "1. Animals"
Partial Paragraph	Lets you create a cross-reference to the first part of a paragraph, up to the specified delimiter, such as a colon or em dash.	See <fullPara delim=" : " includeDelim="`false`"/> See Chapter 7 In this example, only "Chapter 7" is used from the title "Chapter 7: Dogs and Cats." Specify the delimiter (such as : in this example), and indicate whether the delimiter is excluded ("false" or "0") or included ("true" or "1") in the source cross-reference. See "Creating cross-references to partial paragraphs" on page 151.
Text Anchor Name	Inserts the text anchor name. You can create text anchors by choosing New Hyperlink Destination from the Hyperlinks panel menu.	See <txtAnchrName/> See Figure 1

Building block	What it does	Example
Chapter Number	Inserts the chapter number.	in chapter <chapNum/> in chapter 3
File Name	Inserts the filename of the destination document.	in <fileName/> in newsletter.indd
Character Style	Applies a character style to text within a cross-reference.	See <cs name="bold"><fullPara/></cs> on page <pageNum> See **Animals** on page 23. Specify the character style name, and include the text you want to apply the character style to between the <cs name=""> and </cs> tags. See "Apply character styles within a cross-reference" on page 152.

Creating cross-references to partial paragraphs

You can design cross-reference formats to include only the first part of a paragraph. For example, if you have headings in your document that look like, "Chapter 7—Granada to Barcelona," you can create a cross-reference that refers only to "Chapter 7."



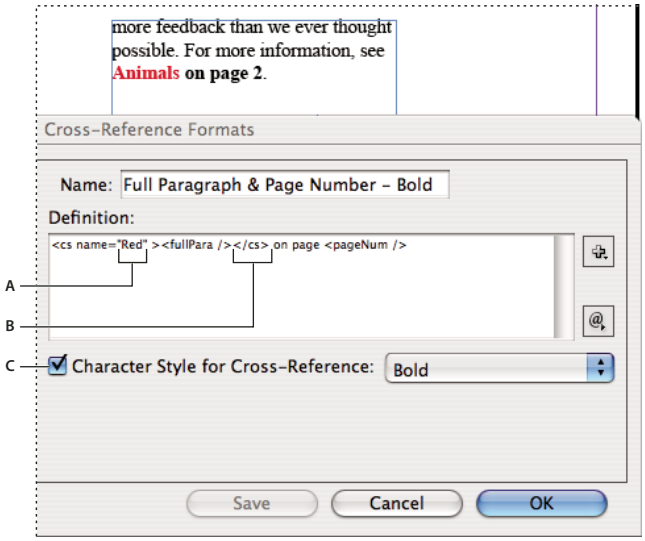
Cross-reference to partial paragraph
A. *The cross-reference source ends at an em dash (^_)* ***B.*** *"false" excludes the em dash from the source*

When you insert the Partial Paragraph building block, you must do two things. First, specify the delimiter between the quotation marks. The delimiter is the character that ends the paragraph. Common delimiters include colons (Chapter 7: Granada), periods (Chapter 7. Granada), and dashes (Chapter 7—Granada). To insert special characters such as em dashes (^_), em spaces (^m), and bullet characters (^8), choose an option from the menu that appears when you click the Special Characters icon.

Second, indicate whether the delimiter character is excluded (Chapter 7) or included (Chapter 7—). Use includeDelim="false" to exclude the delimiter and includeDelim="true" to include the delimiter. Instead of "false" or "true," you can use "0" or "1," respectively.

Apply character styles within a cross-reference

If you want to emphasize a section of text within a cross-reference, you can use the Character Style building block. This building block consists of two tags. The <cs name="*stylename*"> tag indicates which style is applied, and the </cs> tag ends the character style. Any text or building blocks between these tags is formatted in the specified style.



Applying a character style to a section of the cross-reference
A. *This tag applies a character style named "Red."* ***B.*** *This tag ends the character style formatting.* ***C.*** *A character style named "Bold" is applied to the rest of the cross-reference source.*

1 Create the character style you want to use.

2 In the Cross-Reference Formats dialog box, create or edit the format you want to apply.

3 Under Definition, select the text and building blocks to which you want to apply the character style.

4 Choose Character Style from the menu to the right of the definition list.

5 Type the name of the character style between the quotation marks exactly as it appears in the Character Styles panel.

Style names are case sensitive. If the character style is in a group, type the name of the group followed by a colon before the character style, such as **Style Group 1: Red**.

6 Click Save to save the format, and then click OK.

Load (import) cross-reference formats

When you load cross-reference formats from another document, the incoming formats replace any existing formats that share the same name.

In InCopy, you can import cross-reference formats only in standalone documents. You cannot import formats from an InCopy document into an InDesign document. If the new or modified format in InCopy conflicts with a format in the InDesign document when the story is checked in, the InDesign format takes precedence.

1 Choose Load Cross-Reference Formats from the Hyperlinks panel menu.

2 Double-click the document containing the cross-reference formats you want to import.

You can also share cross-reference formats across documents by synchronizing a book.

Delete cross-reference formats

You cannot delete a cross-reference format that has been applied to cross-references in the document.

1 In the Cross-Reference Formats dialog box, select the format you want to delete.

2 Click the Delete Format button .

Manage cross-references

When you insert a cross-reference, the Hyperlinks panel indicates the status of the cross-reference. For example, icons indicate if the destination text appears on the pasteboard PB, a master page MP, a hidden layer HL, in overset text OV, or in hidden text HT. Cross-references that link to such destination areas are *unresolved*. The panel also lets you know if the destination paragraph has been edited (also called *out-of-date*) or is missing . Destination text is *missing* if either the destination text or the file containing the destination text cannot be found. Hold the mouse pointer over any icon to view a tool tip description.

In InCopy, you can manage cross-references only if the story is checked out for editing.

Update cross-references

An update icon indicates that the cross-reference destination text has changed or that the cross-reference source text has been edited. You can easily update the cross-reference. If the destination moves to a different page, the cross-reference is updated automatically.

When you update a cross-reference, any formatting changes you've made to the source text are removed.

When printing or outputting, you are notified if cross-references are out of date or unresolved.

1 Select one or more out-of-date cross-references. To update all cross-references, make sure that none are selected.

2 Do any of the following:

- Click the Update Cross-References button in the Hyperlinks panel.
- Choose Update Cross-Reference from the Hyperlinks panel menu.
- Choose Type > Hyperlinks & Cross-References > Update Cross-Reference.

To update all cross-references in a book, choose Update All Cross-References from the book panel menu. You are notified if any cross-references remain unresolved.

Relink cross-references

If the missing destination text has been moved to a different document, or if the document containing the destination text is renamed, you can relink the cross-reference. When you relink, any changes made to the source cross-reference are removed.

1 In the Cross-References section of the Hyperlinks panel, select the cross-reference you want to relink.

2 Choose Relink Cross-Reference from the Hyperlinks panel menu.

3 Locate the document in which the destination text appears, and then click Open.

If any other destination text appears in that document, you can relink additional cross-references.

Edit cross-references

To change the appearance of the source cross-reference or specify a different format, you can edit the cross-reference. If you edit a cross-reference that links to a different document, the document is opened automatically.

1 Do any of the following:

- Choose Type > Hyperlinks & Cross References > Cross-Reference Options.
- In the Cross-References section of the Hyperlinks panel, double-click the cross-reference you want to edit.
- Select the cross-reference, and choose Cross-Reference Options from the Hyperlinks panel menu.

2 Edit the cross-reference, and then click OK.

Delete cross-references

When you delete a cross-reference, the source cross-reference is converted to text.

1 In the Cross-References section of the Hyperlinks panel, select the cross-reference or cross-references you want to delete.

2 Click the Delete icon, or choose Delete Hyperlink/Cross-Reference from the panel menu.

3 Click Yes to confirm.

To completely remove a cross-reference, you can also select the cross-reference source and delete it.

Editing cross-reference source text

You can edit cross-reference source text. The advantage of editing cross-reference text is that you can change tracking or word spacing as needed for copyfitting, or make other changes. The disadvantage is that if you update or relink the cross-reference, any local formatting changes are removed.

Editing hyperlinks imported from Word

When a Microsoft Word document with hyperlinks is imported into an InDesign document, you may notice a box or border around the hyperlink URLs (such as www.adobe.com). The InDesign document inherits a blue swatch called Word_R0_G0_B255. The document also inherits a character style called “Hyperlink” that underlines the text and applies the blue color.

To remove the box, in the Hyperlinks panel, double-click the hyperlink. Under Appearance, choose Invisible Rectangle from the Type menu, and click OK.

You may also want to delete the imported swatch. While doing so, you can replace it with a different swatch. See Delete individual swatches.

Before you place the Word document in InDesign, you may want to remove the hyperlinks from the URLs in the Word document to avoid inheriting this formatting. See your Word documentation. Another option is to create a character style named “Hyperlink” in the InDesign document before you import. When you import the Word document, the InDesign style that has the same name is used by default.

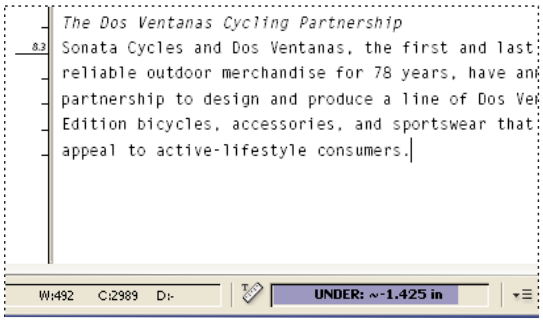
Copyfitting text

Copyfitting text

InCopy keeps track of several text statistics and makes this data available in the Copyfit Info toolbar. As you write your story, the Copyfit Info toolbar automatically displays the number of lines, words, and characters, and the vertical depth at the bottom of the work area for both linked and stand-alone stories in Galley and Layout views.

Note: *You can make the Copyfit Info toolbar a floating panel. (See "Use toolbars" on page 17.)*

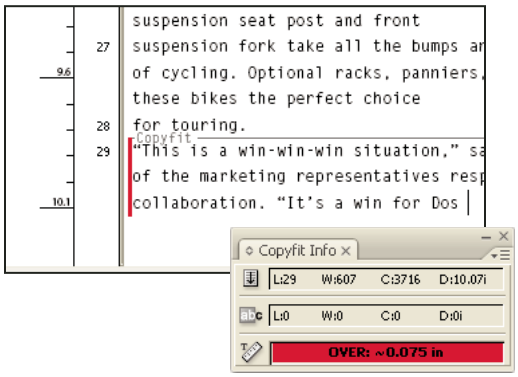
For linked InCopy documents or for stand-alone documents with a Depth setting, the Copyfit Progress Info box indicates the precise amount by which a story is too long or too short. If the story doesn't fill the frames assigned to it, the copyfit box turns blue and displays a count. The length of the blue bar indicates roughly what percentage of the frame is currently filled with text. The shorter the blue bar, the more text you need to add to fill the space.



Copyfit Info toolbar

If the text overflows the assigned frame space, a copyfit line indicates where overset text begins, and the Copyfit Progress Info box turns red and displays the amount you need to cut to fit copy into the frame. (See "Editing overset text" on page 156.)

Note: *The red bar is always the same length. It does not reflect any percentage of the space available.*



The Copyfit Info toolbar also includes options for displaying the number of lines, words, and characters, and the vertical depth in the current selection, from the beginning of the current story to the current insertion point, or from the current insertion point to the end of the current story. (See "Customize Copyfit Info settings" on page 156.)

When you show hidden characters (choose Type > Show Hidden Characters), InCopy displays a number sign (#) at the end of the last character to indicate the end of the text flow for a story. (See "View hidden characters" on page 96.)

Customize Copyfit Info settings

- To add Copyfit Info controls, click the triangle on the right side of the Copyfit Info toolbar, choose Customize, select which items you want to appear in the toolbar, and then click OK.
- To include footnote text in text statistics, choose Include Footnotes In Text Statistics from the Copyfit Info toolbar menu.
- To define word count based on a specified number of characters rather than actual words, choose Define Word Count from the Copyfit Info toolbar menu, select Count Every, specify the number of characters, and click OK.
- To stop updating text statistics while you type, turn off Update Info Automatically from the Copyfit Info toolbar menu.

Editing overset text

If a story is linked to an InDesign layout, the story is limited to the frames the designer specifies. If you specified a Depth setting when creating a stand-alone InCopy document, the story is limited to that depth. When you type more than the allowed length of text, the text is *overset*. When the story is *underset*, there is space available to be filled with text. As you write and edit, you can tell when your story fits perfectly into the InDesign layout. You can still edit overset text.

In Galley view or Story view, overset text is set apart from the rest of the story by a *copyfit break* line. You use the same procedures to write and edit the text, whether it is above or below the copyfit break line.

In Layout view, overset text is not visible, but the Copyfit Progress Info box indicates the number of overset lines in the document.

If you're writing or editing a threaded story in Layout view, you don't need to do anything special when you reach the end of a frame. The insertion point automatically follows the story thread from frame to frame as you type.

Show or hide the depth ruler

❖ In Galley or Story view, choose View > Show Depth Ruler or Hide Depth Ruler.

To change the units of measurement used for the depth ruler, change the Vertical setting in Units & Increments Preferences.

Checking spelling

Check spelling

You can check the spelling in a document or in all open stories. InCopy highlights misspelled or unknown words, repeated words (such as "the the"), uncapitalized words, and uncapitalized sentences. When performing a spell check, InCopy checks all XML content and expanded inline notes.

When you check spelling, InCopy uses the dictionary for the languages you assigned to the text in your document. InCopy uses the Proximity language dictionaries for both spelling and hyphenation. Each dictionary contains hundreds of thousands of words with standard hyphenation breaks.

For stand-alone stories (stories not linked to an InDesign layout), you can customize language dictionaries to ensure that any unique vocabulary you use is recognized and treated correctly. For example, when you run a spelling check (Edit > Spelling > Check Spelling), you can click Add and enter the settings you want.

See also

"Assign a language dictionary to selected text" on page 163

Set spelling preferences

1 Choose Edit > Preferences > Spelling (Windows) or InCopy > Preferences > Spelling (Mac OS).

2 Do any of the following:

- Select Misspelled Words to find words that do not appear in the language dictionary.
- Select Repeated Words to find duplicate words such as "the the."
- Select Uncapitalized Words to find words (such as "germany") that appear in the dictionary only as capitalized words ("Germany").
- Select Uncapitalized Sentences to find uncapitalized words following periods, exclamation points, and question marks.

3 Select Enable Dynamic Spelling to underline potentially misspelled words while you type.

4 Specify the underline color of misspelled words (words not found in the user dictionaries), repeated words (such as "the the"), uncapitalized words (such as "nigeria" instead of "Nigeria"), and uncapitalized sentences (sentences that don't begin with a capital letter).

Note: *To spell-check notes, make sure that Include Note Content When Checking Spelling is selected in Notes preferences. To spell-check deleted text, make sure that Include Deleted Text When Spellchecking is selected in the Track Changes preferences.*

Check spelling

1 If your document includes foreign-language text, select the text and use the Language menu on the Character panel to specify the language for that text.

2 Choose Edit > Spelling > Check Spelling.

Spell-checking begins.

Important: *The Check Spelling command does not check collapsed stories in a multistory file. However, when you select Change All or Ignore All, all collapsed stories and tables are affected.*

3 If you want to change the range of your spell-checking, do any of the following, and then click Start to begin checking the spelling:

- Select Document to check the entire document. Select All Documents to check all open documents.
- Select Story to check all text in the currently selected frame, including text in other threaded text frames and overset text. Select Stories to check stories in all selected frames.
- Select To End Of Story to check from the insertion point.
- Select Selection to check only selected text. This option is available only if text is selected.

4 When unfamiliar or misspelled words or other possible errors are displayed, choose an option:

- Click Skip to continue spell-checking without changing the highlighted word. Click Ignore All to ignore all occurrences of the highlighted word, until InCopy is restarted.
- Select a word from the Suggested Corrections list or type the correct word in the Change To box, and then click Change to change only that occurrence of the misspelled word. You can also click Change All to change all occurrences of the misspelled word in your document.
- To add a word to a dictionary, select the dictionary from the Add To menu, and click Add.
- Click Dictionary to display the Dictionary dialog box, where you can specify the target dictionary and language, and specify hyphenation breaks in the added word. If you want to add the word to all languages, choose All Languages from the Language menu. Click Add.

Correct spelling errors as you type

By turning on Autocorrect, you can allow capitalization errors and common typing mistakes to be replaced while you type. Before Autocorrect will work, you must create a list of commonly misspelled words and associate them with the correct spelling.

1 Choose Edit > Preferences > Autocorrect (Windows) or InCopy > Preferences > Autocorrect (Mac OS).

2 Choose Enable Autocorrect. (You can also choose Edit > Spelling > Autocorrect to turn this feature on or off quickly.)

3 From the Language menu, choose which language the autocorrections are applied to.

4 To correct capitalization errors (such as typing "germany" instead of "Germany"), select Autocorrect Capitalization Errors. You don't need to add the capitalized words to the list of autocorrections.

5 To add a word that you commonly misspell, click Add, type the misspelled word (such as "teh"), type the correction (such as "the"), and then click OK.

6 Continue to add words that you commonly misspell, and then click OK.

When you type any misspelled word you added to the list, the word is automatically replaced by the word you entered as the correction.

To remove autocorrect words you've added, select the word in the list and choose Remove. To edit autocorrect words, select the word, click Edit, retype the correction, and click OK.

Use dynamic spelling

When dynamic spelling is enabled, you can correct spelling errors by using the context menu. Potentially misspelled words are underlined (based on the dictionary associated with the language of the text). If you type text in different languages, select the text and assign the correct language.

1 To enable dynamic spelling, choose Edit > Spelling > Dynamic Spelling.

Potentially misspelled words are underlined in your document.

2 Right-click (Windows) or Control-click (Mac OS) the underlined word, and do one of the following:

- Select a suggested correction. If a word is repeated or needs to be capitalized, you can choose Delete Repeated Word *[word]* or Capitalize *[word]*.
- Select Add *[word]* To User Dictionary. This automatically adds the word to the current dictionary without opening the Dictionary dialog box. The word remains unchanged in the text.
- Select Dictionary. This opens the Dictionary dialog box where you can select the Target dictionary, change hyphenation breaks, and specify a language. If you want to add the word to all languages, choose All Languages from the Language menu, and then click Add. The word is added to the selected dictionary and remains unchanged in the text.
- Select Ignore All to ignore occurrences of this word in all documents. When InCopy is restarted, the word is flagged again as a misspelling.

Note: *If you select Ignore All and then decide that you don't want to ignore that word after all, Choose Ignored Words from the Dictionary List menu in the Dictionary dialog box and remove the word from the list.*

Hyphenation and spelling dictionaries

InCopy uses Proximity dictionaries for most languages to verify spelling and to hyphenate words. You can add words to each dictionary to customize it. You can assign different languages to text, and InCopy uses the appropriate dictionary to handle spelling and hyphenation. You can create additional user dictionaries, and you can import or export word lists saved in a plain text file.

When you customize the words in a dictionary, you actually create lists of *added words* (words that aren't already in the dictionary) and *removed words* (existing dictionary words that you want to be flagged as a potential misspelling). The Dictionary dialog box lets you display and edit added words, removed words, and *ignored words* (words that are ignored for the current session because you clicked Ignore All). You can add words that apply to all languages, which is especially useful for last names, street names, and other items that aren't specific to a language.

If you want to use the language dictionaries from a previous version of InDesign or InCopy, use your system Find command to locate the user dictionary files (.udc), and then add them to your list of dictionaries in Dictionary preferences.

Where dictionary words are stored

By default, hyphenation and spelling exceptions are located in user dictionary files stored outside the document on the computer where InCopy is installed (dictionary file names end with a .clam or .not extension). However, you can also store exception lists inside any InCopy document. In addition, you can store word lists in an external user dictionary, in the document, or in both. The location of existing dictionaries appears in the Dictionary preferences.

Applying languages to text

You can use the Language menu in the Control panel or Character panel to apply a language to selected text. You can also specify a default language for an entire document, or for all new documents. (See "Assign a language to text" on page 196.)

Exception word lists

You can exclude words from being considered. For example, if you want to use an alternate spelling for a common word such as "bicycle," which you may need to spell in a different way for your company name or for a specific document, add the word to the list of excluded words so that it will be flagged during a spell check. InCopy can maintain a separate set of added and removed words for each installed language.

Create or add user dictionaries

You can create a user dictionary, or you can add user dictionaries from previous InDesign or InCopy versions, from files that others have sent you, or from a server where your workgroup's user dictionary is stored. The dictionary you add is used for all your InCopy documents.

1. Choose Edit > Preferences > Dictionary (Windows) or InCopy > Preferences > Dictionary (Mac OS).
2. From the Language menu, choose the language with which you want to associate the dictionary.
3. Do one of the following:

- To create a new dictionary, click the New User Dictionary icon below the Language menu. Specify the name and location of the user dictionary (which includes a .udc extension), and then click Save.
- To add an existing dictionary, click the Add User Dictionary icon , select the user dictionary file, which includes a .udc or .not extension, and then click Open.

Note: *If you can't find the dictionary file, you might want to use your system Find command to locate the .udc files (try using *.udc), note the location, and then try again.*

The dictionary is added to the list under the Language menu. You can add words to the dictionary when checking spelling or by using the Dictionary dialog box.

Set the default language dictionary for all new documents

1 Start InCopy , but do not open a document.

2 Choose Type > Character.

3 Choose the desired dictionary from the Language pop-up menu on the Character panel. If you cannot see the language option in the Character panel, select Show Options and then select your language from the list.

Remove, relink, and reorder user dictionaries

1 Choose Edit > Preferences > Dictionary (Windows) or InCopy > Preferences > Dictionary (Mac OS).

2 From the Language menu, choose the language to which the dictionary belongs.

3 Do any of the following:

- To remove a dictionary from the list, select it and click the Remove User Dictionary icon . You must have at least one dictionary per language.
- If the language dictionary includes a question mark icon next to it, select the dictionary, click the Relink User Dictionary icon , and then locate and open the user dictionary.
- To change the order of the user dictionaries, drag and drop them. The order of the dictionaries in the list is the order in which the dictionaries are checked.

Add words to dictionaries

For stand-alone stories (stories not linked to an InDesign layout), you can add words to the language dictionaries. Customizing your dictionaries ensures that any unique vocabulary you use is recognized and treated correctly.

1 Choose Edit > Spelling > Dictionary.

2 In the Language menu, choose a language. Each language contains at least one dictionary. If you want the word to be added to all languages, choose All Languages.

3 In the Target menu, choose the dictionary where you want to store the word. The Target menu lets you store the changes in an external user dictionary or in any open document.

4 In the Dictionary List menu, choose Added Words.

5 In the Word box, type or edit the word to be added to the word list.

6 Click Hyphenate to see the word's default hyphenation. Tildes (~) indicate possible hyphenation points.

7 If you don't like the hyphenation points, follow these guidelines to indicate your preferred hyphenation of the word:

- Type one tilde (~) to indicate the best possible hyphenation points, or the only acceptable hyphenation point, in the word.
- Type two tildes (~~) to indicate your second choice.
- Type three tildes (~~~) to indicate a poor but acceptable hyphenation point.
- If you want the word never to be hyphenated, type a tilde before its first letter.

If you need to include an actual tilde in a word, type a backslash before the tilde (\~).

8 Click Add, and then click Done. The word is added to the currently selected Dictionary List.

Note: *Remember that hyphenation points interact with the hyphenation settings in your documents. As a result, the word might not break where you expect it to. Control these settings by choosing Hyphenation in the Paragraph panel menu.* *(See "Hyphenate text" on page 222.)*

Remove or edit words in dictionaries

1 Choose Edit > Spelling > Dictionary.

2 In the Language menu, choose a language.

3 In the Target menu, choose the dictionary from which you want to remove the word. The Target menu lets you choose an external user dictionary or any open document.

4 In the Dictionary List menu, do one of the following:

- To modify the list of additions to the selected Target word list, choose Added Words.
- To modify the list of words that are flagged as misspelled, choose Removed Words.
- To modify the list of words that are being ignored during the current InCopy session, choose Ignored Words. This list includes all the words for which you've chosen Ignore All.

5 In the word list, edit the word, or select the word and click Remove.

6 Click Done.

Export a word list

You can export word lists to a text file (.txt) and then import that list of words into a user dictionary in InCopy . The words in the text file must be separated by a space, tab, or paragraph return. You can export added words and removed words, but you cannot export ignored words, which are used only in the current session.

1 Choose Edit > Spelling > Dictionary.

2 Choose the language from the Language menu and the dictionary from the Target menu that contains the list of words you want to export.

3 Click Export, specify the file name and location, and then click Save.

The list of words is saved in a text file. You can edit this list of words in any text editor, and then import the word list. You can also send the word list to others, who can import it into their user dictionaries.

Import a word list

1 Choose Edit > Spelling > Dictionary.

2 Choose the language from the Language menu and the dictionary from the Target menu.

3 Click Import, locate the text file containing your list of spelling exceptions, and then click Open.

Change dictionary preferences

Use Dictionary preferences to specify how InCopy handles hyphenation and spelling dictionaries. Most languages in InCopy use Proximity dictionaries to verify spelling and to hyphenate words. If you have installed hyphenation or spelling components from a different company, you can select a different vendor for each installed language.

Note: *The Dictionary Preferences dialog box does not enable you to specify the language dictionary used for spell checking or hyphenating text. This dialog box is used to specify which hyphenation and spelling plug-ins InCopy uses for the language specified in the Language field. If you use only the default hyphenation and spelling plug-in, you don't need to change any settings in the Dictionary Preferences dialog box. If you install a different spelling or hyphenation plug-in provided by a third-party developer, it appears as an option in the Hyphenation Vendor and Spelling Vendor menus in this dialog box. This would let you select one vendor's hyphenation or spelling engine for some languages and another vendor's hyphenation or spelling engine for other languages.*

1. Choose Edit > Preferences > Dictionary (Windows) or InCopy > Preferences > Dictionary (Mac OS).
2. For Language, specify the language for which you want to edit settings or change the hyphenation or spelling vendor.
3. Create, add, or remove user dictionaries. (See "Create or add user dictionaries" on page 159.)
4. If you have installed a hyphenation component from a company other than Adobe, select it in the Hyphenation menu.
5. If you have installed a spelling dictionary component from a company other than Adobe, select it in the Spelling menu.
6. In the Compose Using menu in the Hyphenation Exceptions menu, do one of the following:
   - To compose text using the hyphenation exceptions list stored in the external user dictionary, choose User Dictionary.
   - To compose text using the hyphenation exceptions list stored inside the document, choose Document.
   - To compose text using both lists, choose User Dictionary And Document. This is the default setting.
7. To recompose all stories when certain settings are changed, select Recompose All Stories When Modified. Selecting this option recomposes stories when you change the Compose Using settings (see step 6) or when you use the Dictionary command to add or remove words. Recomposing all stories can take some time, depending on the amount of text in the document.
8. Click OK.

Using dictionaries in a workgroup

Make sure that each station in your workgroup has the same customized user dictionaries installed and added, so that a document uses the same spelling and hyphenation rules regardless of who is working on it. You can either make sure that everyone adds the same dictionaries to their computer, or you can share a user dictionary over the network server.

A lock icon indicates that a dictionary is locked and can be used, but not edited. When a user dictionary is stored on a server, the first user to load the dictionary locks the file; all subsequent users see that the dictionary is locked. Files can also be locked through the operating system, when the file is made read-only. If you share a user dictionary over the network server, you may want to lock the file so that it's read-only for all users, allowing only the administrator to add words.

Make sure that everyone in the workgroup uses the customized user dictionary installed on the common network workstation, and not the dictionary stored with a document. However, before you take a document to a service provider, you might want to merge the user dictionary into the document.

If you don't share a customized user dictionary on a common network workstation, locate user dictionary files and copy them from one workstation to another. The location of user dictionaries appear in the Dictionary preferences.

After you update a shared workstation's user dictionary, the changes don't appear in individual workstations until a user restarts InCopy or presses Ctrl+Alt+/ (Windows) or Command+ Option+/ (Mac OS) to recompose all text.

Assign a language dictionary to selected text

If you use more than one language in a stand-alone story (stories not linked to an InDesign layout), you can tell InCopy which language dictionary to use for spell checking and hyphenating words in a particular language. You can assign different language dictionaries to the various parts of your document down to a single character of text.

A	Did you purchase the Glock-enspiel?
B	Did you purchase the Glocken-spiel?
C	Did you purchase the Glo-ckenspiel?

Different hyphenation breaks depending on the language dictionary
A. *Glockenspiel in English* ***B.*** *Glockenspiel in Traditional German* ***C.*** *Glockenspiel in Reformed German*

1. Select the text to which you want to assign a dictionary.
2. Choose Type > Character to open the Character panel.
3. At the bottom of the Character panel, choose a dictionary from the Language menu. (If the Language menu doesn't appear in the Character panel, choose Customize from the Character panel menu, select Language, and click OK.)

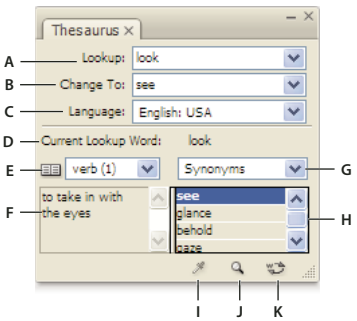
Note: *If the InCopy story is linked to an InDesign layout with an embedded hyphenation list, the embedded list governs spell checking and hyphenation.*

Using the thesaurus

About the thesaurus

The thesaurus lets you look up synonyms, related words, and antonyms for words you specify. For example, if you specify "figment," the InCopy thesaurus provides synonyms such as "fiction" and "fable," related words such as "concoction" and "fantasy," and antonyms such as "fact."

The search for a word doesn't need to end with the first set of synonyms, related words, and antonyms you find. You can look up any one of the suggested words and display its synonyms, related words, and antonyms. You can quickly go back to any of the last 10 words you looked up.



Thesaurus panel
A *.Lookup* ***B*** *.Change To* ***C*** *.Language menu* ***D*** *. Current Lookup Word* ***E*** *. Meanings menu* ***F*** *.Definition* ***G*** *.Category menu* ***H*** *.Result list*
I *.Load Word* ***J*** *.Lookup Word* ***K*** *.Change Word*

InCopy provides the following categories for looking up words:

Synonyms Words having the same or nearly the same meaning as the lookup word.

Antonyms Words having the opposite or nearly the opposite meaning as the lookup word.

See Also Words that are conceptually related to the lookup word, although neither a synonyms nor antonyms.

Near Synonyms Words having a somewhat similar meaning as the lookup word.

Near Antonyms Words having a meaning that is somewhat akin to the opposite meaning of the lookup word.

Look up words in the thesaurus

You can use the thesaurus to look up synonyms, antonyms, and brief definitions of words.

Look up a word visible in the document window

1 Choose Window > Thesaurus to open the Thesaurus panel.

2 Using the Type tool T, select the word you want to look up, and do one of the following:

- Copy and paste the word into the Lookup text box and press Enter.
- Click the Load Word button .

3 Select the language you want to use.

4 Click the Lookup Word button .

A brief definition of the word is displayed in the Definition area of the Thesaurus panel. The Result list displays related words based on the selections you made from the Meanings and Category menus.

Note: *You can drag the vertical bar that separates the Definition area and the Result list from side to side to adjust the relative width of the two areas.*

5 Select the part of speech you want to look up from the Meanings menu. For example, if you want the noun meaning for the word, select noun. If you want the verb meaning, select verb. Not all meanings are available for all words.

6 Select the category (such as Synonyms or Antonyms) you want to look up from the Categories menu. Not all categories are available for all words.

To replace the word in the Lookup field, Alt-click (Windows) or Option-click (Mac OS) a word in the Result list, and then click the Lookup Word button. To replace the word in the Change To field, Ctrl-click (Windows) or Command-click (Mac OS) a word in the Result list.

Look up a word not visible in the document window

1 Choose Window > Thesaurus to open the Thesaurus panel.

2 Type the word you want to look up in the Lookup text box, and press Enter.

Look up a word again

1 Choose Window > Thesaurus to open the Thesaurus panel.

2 Choose the word from the Lookup pop-up menu in the Thesaurus panel. This menu lists the last 10 words you looked up.

3 Click the Lookup Word button .

Insert a word from the Thesaurus panel

You can use the Thesaurus panel to add or replace words in your document. When replacing a selected word in your document with a word from the Thesaurus panel, you replace only the selected word—not all occurrences of the word. To replace all occurrences, use the Find/Change command.

Note: *If the thesaurus cannot find a matching entry for the string of text in the Lookup text box, all other text boxes in the Thesaurus panel remain empty.*

1 Do one of the following:

- To add the word, place the insertion point in the document where you want to add the word.
- To replace a word in the document, select the word.

2 Select a word from the Result list in the Thesaurus panel.

3 Click the Change Word button , or double-click a word in the Result list.

Chapter 6: Styles

A *style* is a collection of formatting that can be applied to items throughout a document. You can create styles for paragraphs, characters, tables, and cells in a table.

Paragraph and character styles

About character and paragraph styles

A *character style* is a collection of character formatting attributes that can be applied to text in a single step. A *paragraph style* includes both character and paragraph formatting attributes, and can be applied to a paragraph or range of paragraphs. Paragraph styles and character styles are found on separate panels. Paragraph and characters styles are sometimes called *text styles*.

When you change the formatting of a style, all text to which the style has been applied will be updated with the new format.

You can create, edit, and delete styles in stand-alone Adobe InCopy documents or in InCopy content that is linked to an Adobe InDesign CS4 document. When the contents are updated in InDesign, new styles are added to the InDesign document, but any style modifications made in InCopy will be overridden by the InDesign style. For linked content, it is usually best to manage your styles in InDesign.

For a video tutorial on making a paragraph style, see www.adobe.com/go/lrvid4277_id. For a video tutorial on using text styles, see www.adobe.com/go/vid0076.

[Basic Paragraph] styles

By default, each new document contains a [Basic Paragraph] style that is applied to text you type. You can edit this style, but you can't rename or delete it. You can rename and delete styles that you create. You can also select a different default style to apply to text.

Character style attributes

Unlike paragraph styles, character styles do not include all the formatting attributes of selected text. Instead, when you create a character style, InDesign makes only those attributes that are different from the formatting of the selected text part of the style. That way, you can create a character style that, when applied to text, changes only some attributes, such as the font family and size, ignoring all other character attributes. If you want other attributes to be part of the style, add them when editing the style.

Next Style

You can automatically apply styles as you type text. If, for example, your document's design calls for the style "body text" to follow a heading style named "heading 1," you can set the Next Style option for "heading 1" to "body text." After you've typed a paragraph styled with "heading 1," pressing Enter or Return starts a new paragraph styled with "body text."

If you use the context menu when applying a style to two or more paragraphs, you can cause the parent style to be applied to the first paragraph and the Next Style to be applied to the additional paragraphs. (See "Apply styles" on page 170.)

To use the Next Style feature, choose a style from the Next Style menu when you're creating or editing a style.

To view a video tutorial on using the Next Style feature by Jeff Witchel, go to www.layersmagazine.com/using-the-next-style-paragraph-feature-in-indesign.html.

Styles panel overview

Use the Character Styles panel to create, name, and apply character styles to text within a paragraph; use the Paragraph Styles panel to create, name, and apply paragraph styles to entire paragraphs. Styles are saved with a document and display in the panel each time you open that document.

When you select text or position the insertion point, any style that has been applied to that text is highlighted in either of the Styles panels, unless the style is in a collapsed style group. If you select a range of text that contains multiple styles, no style is highlighted in the Styles panel. If you select a range of text to which multiple styles are applied, the Styles panel displays "(Mixed)."

Open the Paragraph Styles panel

❖ Choose Type > Paragraph Styles, or click the Paragraph Styles tab, which appears by default on the right side of the application window.

Open the Character Styles panel

❖ Choose Type > Character Styles, or click the Character Styles tab on the right side of the application window.

Add paragraph and character styles

If the styles you want already exist in another InDesign, InCopy, or word-processing document, you can import those styles for use in your current document. If you are working with a stand-alone story, you can also define character and paragraph styles in InCopy.

See also

"Group styles" on page 181

"Create nested styles" on page 175

"Apply styles" on page 170

"Duplicate styles or style groups" on page 181

Define paragraph or character styles

1 If you want to base a new style on the formatting of existing text, select that text or place the insertion point in it.

If a group is selected in the Styles panel, the new style will be part of that group.

2 Choose New Paragraph Style from the Paragraph Styles panel menu, or choose New Character Style from the Character Styles panel menu.

3 For Style Name, type a name for your new style.

4 For Based On, select which style the current style is based on.

Note: *The Based On option lets you link styles to each other, so that changes in one style ripple through the styles that are based on it. By default, new styles are based on [No Paragraph Style] for paragraph styles or [None] for character styles, or on the style of any currently selected text.*

5 For Next Style (Paragraph Styles panel only), specify which style is applied after the current style when you press Enter or Return.

6 To add a keyboard shortcut, position the insertion point in the Shortcut box, and make sure Num Lock is turned on. Then hold down any combination of Shift, Alt, and Ctrl (Windows), or Shift, Option, and Command (Mac OS), and press a number on the numeric keypad. You cannot use letters or non-keypad numbers for defining style shortcuts. If your keyboard does not have a Num Lock key, you cannot add keyboard shortcuts to styles.

7 If you want the new style to be applied to the selected text, select Apply Style To Selection.

8 To specify the formatting attributes, click a category (such as Basic Character Formats) on the left, and specify the attributes you want to add to your style.

When specifying a Character Color in the Style Options dialog box, you can create a new color by double-clicking the fill or stroke box.

9 For character styles, attributes you do not specify are ignored; when the style is applied, text will retain the paragraph style formatting for that attribute. To remove an attribute setting from a character style:

- From a setting's menu, choose (Ignore).
- In a text box, delete the option text.
- In a check box, click until you see a small box (Windows) or a hyphen (-) (Mac OS).
- For a character color, hold down Ctrl (Windows) or Command (Mac OS) and click the color swatch.

10 When you've finished specifying the formatting attributes, click OK.

Styles you create appear only in the current document. If no document is open, the styles you create will appear in all new documents.

Base one paragraph or character style on another

Many document designs feature hierarchies of styles sharing certain attributes. The headings and subheads, for example, often use the same font. You can easily create links between similar styles by creating a base, or *parent*, style. When you edit the parent style, the *child* styles will change as well. You can then edit the child styles to distinguish them from the parent style.

To create a style that's nearly identical to another style, but without the parent-child relationship, use the Duplicate Style command and then edit the copy.

1 Create a new style.

2 In the New Paragraph Style or New Character Style dialog box, select the parent style in the Based On menu. The new style becomes the child style.

By default, new styles are based on [No Paragraph Style] or [None], or on the style of any currently selected text.

3 Specify formatting in the new style to distinguish it from the style on which it's based. For example, you might want to make the font used in a subheading slightly smaller than the one used in the heading (parent) style.

If you make changes to the formatting of a child style and decide you want to start over, click Reset To Base. That restores the child style's formatting to be identical to the style on which it's based. Then you can specify new formatting. Similarly, if you change the Based On style of the child style, the child style definition is updated to match its new parent style.

Import styles from other documents

You can import paragraph styles and character styles from an InDesign or InCopy document into a stand-alone InCopy document or InCopy content that is linked to InDesign. You can determine which styles are loaded, and what should occur if a loaded style has the same name as a style in the current document.

Note: *If you import styles into linked content, new styles are added to the InDesign document when the content is updated, and any style with a name conflict is overridden by the InDesign style with the same name.*

1 In the Character Styles or Paragraph Styles panel, do one of the following:

- Choose Load Character Styles or Load Paragraph Styles in the Styles panel menu.
- Choose Load All Text Styles in the Styles panel menu to load both character and paragraph styles.

2 Double-click the InDesign document containing the styles you want to import.

3 In the Load Styles dialog box, make sure that a check mark appears next to the styles you want to import. If any existing style has the same name as one of the imported styles, choose one of the following options under Conflict With Existing Style, and then click OK:

Use Incoming Style Definition Overwrites the existing style with the loaded style and applies its new attributes to all text in the current document that used the old style. The definitions of the incoming and existing styles are displayed at the bottom of the Load Styles dialog box so that you can view a comparison.

Auto-Rename Renames the loaded style. For example, if both documents have a Subheading style, the loaded style is renamed "Subheading copy" in the current document.

Convert Word styles to InDesign styles

While importing a Microsoft Word document into InDesign or InCopy, you can map each style used in Word to a corresponding style in InDesign or InCopy. By doing so, you specify which styles format the imported text. A disk icon appears next to each imported Word style until you edit the style in InDesign or InCopy.

1 Do one of the following:

- To add the Word document to existing text in InDesign or InCopy, choose File > Place. Select Show Import Options, and then double-click the Word document.
- To open the Word document in a stand-alone InCopy document, start InCopy, choose File > Open, and then double-click the Word file.

2 Select Preserve Styles And Formatting From Text And Tables.

3 Select Customized Style Import, and then click Style Mapping.

4 In the Style Mapping dialog box, select the Word style, and then select an option from the menu under InCopy style. You can choose the following options:

- If there is no style name conflict, choose New Paragraph Style, New Character Style, or choose an existing InCopy style.
- If there is a style name conflict, choose Redefine InCopy Style to format the imported style text with the Word style. Choose an existing InCopy style to format the imported style text with the InCopy style. Choose Auto Rename to rename the Word style.

5 Click OK to close the Style Mapping dialog box, and then click OK to import the document.

See also

"Place (import) text" on page 91

"Paste text" on page 95

Apply styles

By default, applying a paragraph style won't remove any existing character formatting or character styles applied to part of a paragraph, although you have the option of removing existing formatting when you apply a style. A plus sign (+) appears next to the current paragraph style in the Styles panel if the selected text uses a character or paragraph style and also uses additional formatting that isn't part of the applied style. Such additional formatting is called an *override* or *local* formatting.

Character styles remove or reset character attributes of existing text if those attributes are defined by the style.

See also

"Use Quick Apply" on page 183

"Override character and paragraph styles" on page 172

Apply a character style

1 Select the characters to which you want to apply the style.

2 Do one of the following:

- Click the character style name in the Character Styles panel.
- Press the keyboard shortcut you assigned to the style. (Make sure that Num Lock is on.)

Apply a paragraph style

1 Click in a paragraph, or select all or part of the paragraphs to which you want to apply the style.

2 Do one of the following:

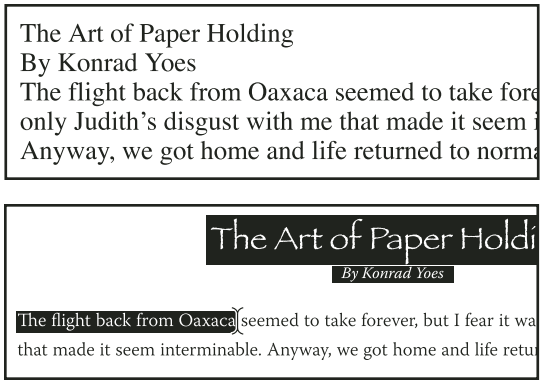
- Click the paragraph style name in the Paragraph Styles panel.
- Press the keyboard shortcut you assigned to the style. (Make sure that Num Lock is on.)

3 If any unwanted formatting remains in the text, choose Clear Overrides from the Paragraph Styles panel.

Apply sequential styles to multiple paragraphs

The Next Style option specifies which style will be automatically applied when you press Enter or Return after applying a particular style. It also lets you apply different styles to multiple paragraphs in a single action.

For example, suppose you have three styles for formatting a newspaper column: Title, Byline, and Body. Title uses Byline for Next Style, Byline uses Body for Next Style, and Body uses [Same Style] for Next Style. If you select an entire article, including the title, the author's byline, and the paragraphs in the article, and then apply the Title style using the special "Next Style" command in the context menu, the article's first paragraph will be formatted with the Title style, the second paragraph will be formatted with the Byline style, and all other paragraphs will be formatted with the Body style.



Before and after applying a style with Next Style.

1 Select the paragraphs to which you want to apply the styles.

2 In the Paragraph Styles panel, right-click (Windows) or Control-click (Mac OS) the parent style, and then choose Apply *[Style Name]* Then Next Style.

If the text includes formatting overrides or character styles, the context menu also lets you remove overrides, character styles, or both.

Edit character and paragraph styles

One of the advantages of using styles is that when you change the definition of a style, all of the text formatted with that style changes to match the new style definition.

Note: *If you edit styles in InCopy content that's linked to an InDesign document, the modifications are overridden when the linked content is updated.*

See also

"Override character and paragraph styles" on page 172

Edit a style using the dialog box

1 Do one of the following:

- If you don't want the style to be applied to selected text, right-click (Windows) or Control-click (Mac OS) the style name in the Styles panel, and choose Edit *[style name]*.
- In the Styles panel, double-click the style name, or select the style and choose Style Options in the Styles panel menu. Note that this applies the style to any selected text or text frame or, if no text or text frame is selected, sets the style as the default style for any text you type in new frames.

2 Adjust settings in the dialog box, and then click OK.

Redefine a style to match selected text

After you apply a style, you can override any of its settings. If you decide you like the changes you made, you can redefine the style so that it matches the formatting of the text you changed.

Note: *If you redefine styles in InCopy content linked to an InDesign document, the modifications are overridden when the linked content is updated.*

1 Using the Type tool T , select the text formatted with the style you want to redefine.

2 Make changes to the paragraph or character attributes as necessary.

3 Choose Redefine Style in the Styles panel menu.

Delete character or paragraph styles

When you delete a style, you can select a different style to replace it, and you can choose whether to preserve the formatting. When you delete a style group, you delete all styles within the group. You are prompted to replace each style in the group one at a time.

1 Select the style name in the Styles panel.

2 Do one of the following:

- Choose Delete Style in the panel menu or click the Delete icon at the bottom of the panel.
- Right-click (Windows) or Control-click (Mac OS) the style, and then choose Delete Style. This method is especially useful for deleting a style without applying it to text.

3 In the Delete Paragraph Style dialog box, select the style to replace it.

If you select [No Paragraph Style] to replace a paragraph style or [None] to replace a character style, select Preserve Formatting to keep the formatting of text to which the style is applied. The text preserves its formatting but is no longer associated with a style.

4 Click OK.

To delete all unused styles, choose Select All Unused in the Styles panel menu, and then click the Delete icon. When you delete an unused style, you are not prompted to replace the style.

See also

"Group styles" on page 181

Override character and paragraph styles

When you apply a paragraph style, character styles and other previous formatting remain intact. After you apply a style, you can override any of its settings by applying formatting that's not part of the style. When formatting that is not part of a style is applied to text with that style applied, it is called an *override* or *local* formatting. When you select text with an override, a plus sign (+) appears next to the style name. In character styles, an override is displayed only if the applied attribute is part of the style. For example, if a character style only changes text color, applying a different font size to the text does not appear as an override.

You can clear character styles and formatting overrides when you apply a style. You can also clear overrides from a paragraph to which a style has been applied.

If a style has a plus sign (+) next to it, hold the mouse pointer over the style to view a description of the override attributes.

See also

"Redefine a style to match selected text" on page 171

Preserve or remove overrides when applying paragraph styles

- To apply a paragraph style and preserve character styles, but remove overrides, hold down Alt (Windows) or Option (Mac OS) as you click the name of the style in the Paragraph Styles panel.

- To apply a paragraph style and remove both character styles and overrides, hold down Alt+Shift (Windows) or Option+Shift (Mac OS) as you click the name of the style in the Paragraph Styles panel.

Right-click (Windows) or Control-click (Mac OS) the style in the Paragraph Styles panel, and then choose an option from the context menu. You can then clear overrides, character styles, or both while applying the style.

Clear paragraph style overrides

1 Select the text containing the overrides. You can even select multiple paragraphs with different styles.

2 In the Paragraph Styles panel, do any of the following:

- To remove paragraph and character formatting, click the Clear Overrides icon , or choose Clear Overrides from the Paragraph Styles panel.
- To remove character overrides, but preserve paragraph formatting overrides, hold down Ctrl (Windows) or Command (Mac OS) as you click the Clear Overrides icon.
- To remove paragraph-level overrides, but preserve character-level overrides, in the Paragraph Styles panel, hold down Shift+Ctrl (Windows) or Shift+Command (Mac OS) as you click the Clear Overrides icon.

Note: *When you clear overrides, paragraph-level overrides are removed from the entire paragraph, even if only part of the paragraph is selected. Character-level overrides are removed only from the selection.*

Clearing overrides does not remove character style formatting. To remove character style formatting, select the text containing the character style, and then click [None] in the Character Styles panel.

Break the link between text and its style

When you break the link between text and its style, the text retains its current formatting. However, future changes to that style will not be reflected in the text that was separated from the style.

1 Select the text that is marked with the style that you want to break from.

2 Choose Break Link To Style from the Styles panel menu.

If no text is selected when you choose Break Link To Style, any new text you type uses the same formatting as the selected style, but no style is assigned to that text.

Convert style bullets and numbering to text

When you create a style that adds bullets or numbering to paragraphs, these bullets and numbers may be lost if the text is copied or exported to a different application. To avoid this problem, convert the style bullets or numbering to text.

Note: *If you convert style bullets in an InCopy story linked to an InDesign layout, the change may be overridden when the content is updated in InDesign.*

1 In the Paragraph Styles panel, select the style that contains the bullets and numbering.

2 In the Paragraph Styles panel menu, choose Convert "*[style]*" Bullets and Numbering to Text.

If you convert bullets and numbering to text in a style on which another style is based (a *parent* style), the bullets and numbering in the child style are also converted to text.

After you convert numbering to text, you may need to update numbers manually if you edit the text.

See also

"Create a paragraph style for running lists" on page 217

Find and replace character and paragraph styles

Use the Find/Change dialog box to find instances of a particular style and replace it with another.

1 Choose Edit > Find/Change.

2 For Search, select Document to change the style throughout the document.

3 Leave the Find What and Change To options blank. If the Find Format and Change Format boxes don't appear at the bottom of the dialog box, click More Options.

4 Click the Find Format box to display the Find Format Settings dialog box. Under Style Options, select the character or paragraph style you want to search for, and then click OK.

5 Click the Change Format box to display the Change Format Settings dialog box. Under Style Options, select the replacement character or paragraph style, and then click OK.

6 Click Find, and then use the Change, Change/Find, or Change All buttons to replace the style.

See also

"Find and change text" on page 110

"Find and change fonts" on page 122

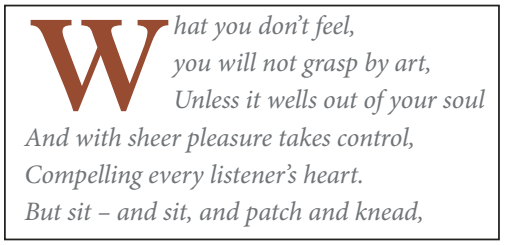
Drop caps and nested styles

There are three main ways to use Drop Caps and Nested Styles feature: to apply a character style to a drop cap, to apply a nested style to text at the beginning of a paragraph, and to apply a nested line style to one or more lines in a paragraph.

Apply a character style to a drop cap

You can apply a character style to the drop-cap character or characters in a paragraph. For example, if you want a drop-cap character to have a different color and font than the rest of the paragraph, you can define a character style that has these attributes. Then you can either apply the character style directly to a paragraph, or you can nest the character style in a paragraph style.

Note: *You cannot create new styles in InCopy content linked to an InDesign layout.*



Drop cap formatted automatically by nested character style

1 Create a character style that has the formatting you want to use for the drop-cap character.

2 Do one of the following:

- To apply the drop cap to a single paragraph, choose Drop Caps And Nested Styles from the Paragraph panel menu.
- To nest the character style in a paragraph style, double-click the paragraph style, and then click Drop Caps And Nested Styles.

3 Specify the number of drop-cap lines and characters, and then choose the character style.

4 If the drop cap is aligned too far away from the left edge, select Align Left Edge.

Selecting this option uses the original left side bearing of the drop-cap character rather than the larger value. It's particularly useful for drop caps formatted in sans serif fonts.

5 If the drop cap character overlaps the text below it, select Scale For Descenders.

6 Click OK.

If you want to apply a different nested style to any characters after the drop cap, use the New Nested Style option. (See "Create nested styles" on page 175.)

See also

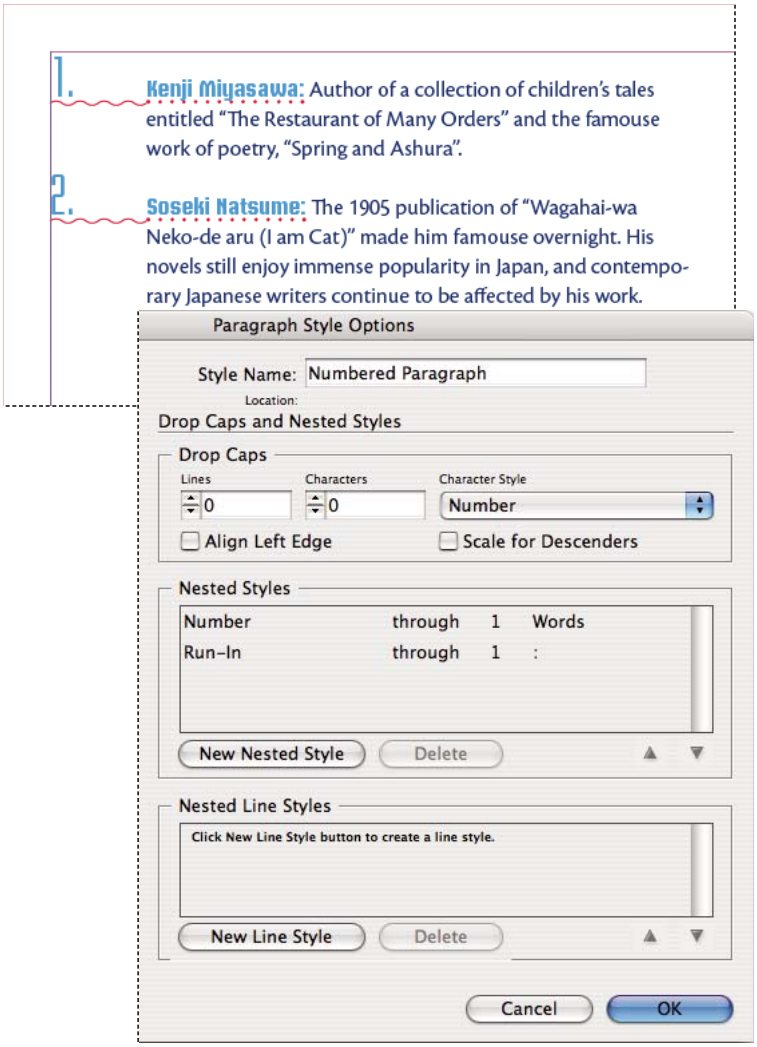
"Use drop caps" on page 199

Create nested styles

You can specify character-level formatting for one or more ranges of text within a paragraph or line. You can also set up two or more nested styles to work together, one taking over where the previous one ends. For paragraphs with repetitive and predictable formatting, you can even loop back to the first style in the sequence.

Nested styles are especially useful for run-in headings. For example, you can apply one character style to the first letter in a paragraph and another character style that takes effect through the first colon (:). For each nested style, you can define a character that ends the style, such as a tab character or the end of a word.

Note: *You can create new styles in a stand-alone InCopy document, but not in content linked to an InDesign layout.*



In this example, the Number character style formats the first word, and the Run-in character style formats text through the first colon.

Create one or more nested styles

1 Create one or more character styles that you want to use to format text.

2 Do one of the following:

- To add nested styles to a paragraph style, double-click the paragraph style, and then click Drop Caps And Nested Styles.
- To add nested styles to a single paragraph, choose Drop Caps And Nested Styles from the Paragraph panel menu.

Note: *For best results, apply nested styles as part of paragraph styles. If you apply nested styles as local overrides to a paragraph, subsequent editing or formatting changes in the nested style can produce unexpected character formatting in the styled text.*

3 Click New Nested Style one or more times.

4 Do any of the following for each style, and then click OK:

- Click the character style area, and then select a character style to determine the appearance of that section of the paragraph. If you haven't created a character style, choose New Character Style and specify the formatting you want to use.
- Specify the item that ends the character style formatting. You can also type the character, such as a colon (:) or a specific letter or number. You cannot type a word.
- Specify how many instances of the selected item (such as characters, words, or sentences) are required.
- Choose Through or Up To. Choosing Through includes the character that ends the nested style, while choosing Up To formats only those characters that precede this character.
- Select a style and click the up button ▲ or down button ▼ to change the order of the styles in the list. The order of the styles determines the sequence in which the formatting is applied. The formatting defined by the second style begins where the formatting of the first style concludes. If you apply a character style to the drop cap, the drop-cap character style acts as the first nested style.

Create nested line styles

You can apply a character style to a specified number of lines in a paragraph. As with nested styles, you can set up two or more nested line styles to work together, and you can create a repeating sequence.

Attributes applied by nested line styles can co-exist with attributes applied by nested styles. For example, a nested line style can apply a color while a nested style can apply italics. If both set conflicting settings of the same attribute, such as red and blue, the nested style takes precedence over the nested line style.

1 Create one or more character styles that you want to use to format text.

2 Do one of the following:

- To add nested line styles to a paragraph style, double-click the paragraph style, and then click Drop Caps And Nested Styles.
- To add nested line styles to a single paragraph, choose Drop Caps And Nested Styles from the Paragraph panel menu.

3 Click New Nested Line Style one or more times.

4 Click the character style area, and then select a character style to determine the appearance of that section. If you haven't created a character style, choose New Character Style and specify the formatting you want to use.

5 Specify the number of paragraph lines you want the character style to affect.

Select a style and click the up button ▲ or down button ▼ to change the order of the styles in the list. The order determines the sequence in which the formatting is applied.

6 Click OK.

Loop through nested styles

You can repeat a series of two or more nested styles throughout a paragraph. A simple example would be to alternate red and green words in a paragraph. Or, in nested line styles you could alternate red and green lines in a paragraph. The repeating pattern remains intact even if you add or remove words in the paragraph.

1 Create the character styles you want to use.

2 Edit or create a paragraph style, or place the insertion point in the paragraph you want to format.

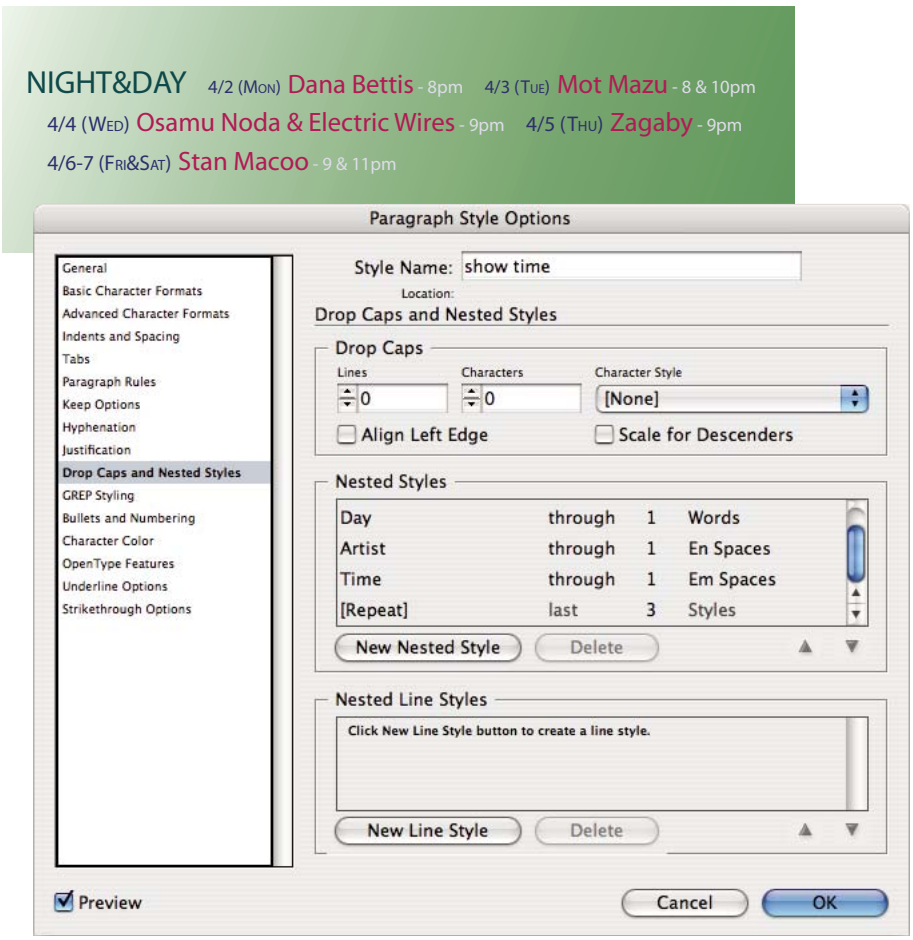
3 In the Drop Caps And Nested Styles section or dialog box, click New Nested Style (or New Nested Line Style) at least twice and choose settings for each style.

4 Do either of the following:

- For nested styles, click New Nested Style again, choose [Repeat] in the character style area, and specify how many nested styles will be repeated.
- For nested line styles, click New Nested Line Style again, choose [Repeat] in the character style area, and specify how many lines will be repeated.

In some cases, you may want to skip the first style or styles. For example, an events calendar paragraph may include "This Week's Events" followed by days of the week and their events. In this case, you could create five nested styles: one for "This Week's Events," one each for the day, event, and event time, and a final style with a [Repeat] value of 3, thereby excluding the first nested style from the loop.

The [Repeat] item should be the last in the list. Any nested style below [Repeat] is ignored.



Looping through nested styles

5 Click OK.

Nested style character style options

To determine how a nested character style ends, select any of the following:

If you don't want the character to be included in the nested style formatted, choose Up To instead of Through when you define the nested style.

Sentences Periods, question marks, and exclamation points indicate the end of a sentence. If a quotation mark follows the punctuation, it is included as part of the sentence.

Words Any space or white space character indicates the end of a word.

Characters Any character other than zero-width markers (for anchors, index markers, XML tags and so on) is included.

Note: *If you select Characters, you can also type a character, such as a colon or a period, to end the nested style. If you type multiple characters, any of those characters will end the style. For example, if your run-in headings end with a hyphen, colon, or question mark, you can type* ***-:?*** *to end the nested style where any of these characters appears.*

Letters Any character that does not include punctuation, white space, digits, and symbols.

Digits The Arabic numerals 0–9 are included.

End Nested Style Character Extends the nested style up to or through the appearance of the End Nested Style character you insert. To insert this character, choose Type > Insert Special Character > Other > End Nested Style Here.

Tab Characters Extends the nested style up to or through the tab character (not the tab setting).

Forced Line Break Extends the nested style up to or through the forced line break. (Choose Type > Insert Break Character > Forced Line Break.)

Indent To Here Character Extends the nested style up to or through the Indent To Here character. (Choose Type > Insert Special Character > Other > Indent To Here.)

Em Spaces, En Spaces, or Non-breaking Spaces Extends the nested style up to or through the space character. (Choose Type > Insert White Space > *[space character]*.)

Anchored Object Marker Extends the nested style up to or through an inline graphic marker, which appears where an inline graphic is inserted.

Auto Page Number / Section Marker Extends the nested style up to or through the page number or section name marker.

End a nested style

In most cases, a nested style ends where the condition of the defined style is met, such as after three words or where a period appears. However, you can also end a nested style before the condition is met using the End Nested Style Here character.

1. Place the insertion point where you want the nested style to end.
2. Choose Type > Insert Special Character > Other > End Nested Style Here.

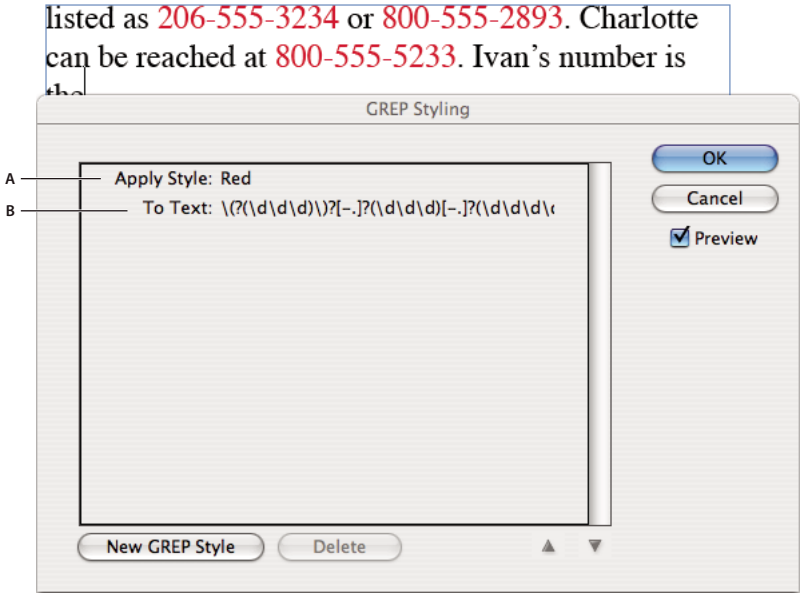
This character ends the nested style at that point, regardless of the nested style definition.

Remove the formatting of a nested style

- In the Drop Caps And Nested Styles dialog box, or in the Drop Caps And Nested Styles section of the Paragraph Style Options dialog box, select the nested style and click Delete.
- Apply a different paragraph style.

Create GREP styles

GREP is an advanced, pattern-based search technique. You can use GREP styles to apply a character style to text that conforms to the GREP expression you specify. For example, suppose you want to apply a character style to all the phone numbers in text. When you create a GREP style, you select the character style and specify the GREP expression. All paragraph text that matches the GREP expression is formatted with the character style.



Using GREP style to format phone numbers with a character style
A. *Character style* ***B.*** *GREP expression*

For a video tutorial on creating GREP styles, see www.adobe.com/go/lrvid4028_id.

1 Do one of the following:

- To apply GREP styling to individual paragraphs, select the paragraphs and choose Grep Styles from the Paragraph or Control panel menu.
- To use GREP styles in a paragraph style, create or edit a paragraph style, and click the GREP Styling tab on the left side of the Paragraph Style Options dialog box.

2 Click New GREP Style.

3 Click to the right of Apply Style, and then specify a character style. If you haven't created a character style to use, choose New Character Style and specify the formatting you want to use.

4 Click to the right of To Text and do any of the following to construct a GREP expression:

- Enter the search expression manually. (See "Metacharacters for searching" on page 117.)
- Click the Special Characters For Search icon to the right of the To Text field. Choose options from the Locations, Repeat, Match, Modifiers, and Posix submenus to help construct the GREP expression.

5 Click OK.

See also

"Search using GREP expressions" on page 113

GREP styles video

Working with styles

Duplicate styles or style groups

❖ Right-click (Windows) or Control-click (Mac OS) a style or style group in the Styles panel, and then choose Duplicate Style.

A new style or group appears in the Styles panel, with the same name followed by "copy." If you duplicated a group of styles, the style names within the new group remain the same.

You can also duplicate styles by copying them to another group.

Group styles

You can organize styles by grouping them into separate folders in the Character Styles, Paragraph Styles, Object Styles, Table Styles, and Cell Styles panels. You can even nest groups within groups. Styles do not need to be in a group; you can add them to a group or to the root level of the panel.

Create a style group

1 In the Styles panel:

- To create the group at the root level, deselect all styles.
- To create a group within a group, select and open a group.
- To include existing styles in the group, select the styles.

2 Choose New Style Group from the Styles panel menu, or choose New Group From Styles to move the selected styles into the new group.

3 Type the name of the group and click OK.

4 To move a style into the group, drag the style over the style group. When the style group is highlighted, release the mouse button.

Copy styles to a group

When you copy a style to a different group, the styles are not linked. Even though they have the same name, editing one style does not change the attributes of the other style.

1 Select the style or group you want to copy.

2 Choose Copy To Group from the Styles panel menu.

3 Select the group (or [Root] level) that you want to copy the styles or group to, and then click OK.

If the group already contains style names identical to those being copied, incoming styles are renamed.

Expand or collapse style groups

- To expand or collapse only one group, click the triangle icon next to it.
- To expand or collapse the group and all its subgroups, Ctrl-click (Windows) or Command-click (Mac OS) the triangle icon.

Delete style groups

Deleting a style group deletes the group and everything inside it, including styles and other groups.

1 Select the group you want to delete.

2 Choose Delete Style Group from the Styles panel menu, and then click Yes.

3 For each style in the group, specify a replacement style or choose [None], and then click OK.

If you want to use the same replacement style for all styles, select Apply To All.

If you cancel the replacement of any style, the group is not deleted. You can recover deleted styles by choosing Edit > Undo Delete Styles.

Move and reorder styles

By default, styles you create appear at the bottom of the style group or panel.

- To alphabetize all groups and styles within groups, choose Sort By Name from the Styles panel menu.
- To move a single style, drag it to a new location. A black line indicates where the style will be moved to; a highlighted group folder indicates that the style will be added to that group.

Chapter 7: Typography

Typography gives visual form to language. AdobeInCopy CS4 gives you the tools you need to set type that suits your content. The fonts you choose and the settings you select for leading and kerning are examples of decisions you can make about the appearance of the text in your document.

Formatting text

Format text

For a video tutorial on formatting characters, see www.adobe.com/go/lrvid4275_id. For a video tutorial on formatting paragraphs, see www.adobe.com/go/lrvid4276_id.

Use the Character panel and Paragraphs panel to change the appearance of text. In InDesign, you can also use the Control panel to format text. The Control panel is not available in InCopy.

Note the following methods of formatting text:

- To format characters, you can use the Type tool T to select characters, or you can click to place the insertion point, select a formatting option, and then begin typing.
- To format paragraphs, you don't need to select an entire paragraph—selecting any word or character, or placing the insertion point in a paragraph will do. You can also select text in a range of paragraphs.
- To set the formatting for all future text frames that you'll create in the current document, make sure that the insertion point is not active and that nothing is selected, and then specify text formatting options. To set default text formatting for all new documents, close all documents, and then specify the text settings. See "Set defaults" on page 28.
- Select a frame to apply formatting to all text inside it. The frame cannot be part of a thread.
- Use paragraph styles and character styles to format text quickly and consistently.

For a video tutorial on working with text, see www.adobe.com/go/vid0075.

1 Select the Type tool T .
2 Click to place an insertion point, or select the text that you want to format.
3 Choose Type > Paragraph or Type > Character to display the Paragraph or Character panel.
4 Specify formatting options.

See also

Working with Text video

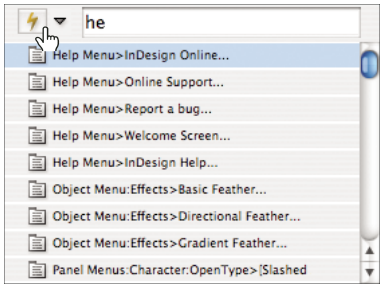
Use Quick Apply

Use Quick Apply to find and apply styles, menu commands, scripts, variables, and most other commands that can be found in the Keyboard Shortcuts dialog box.

1 Select the text or frame to which you want to apply the style, menu command, script, or variable.
2 Choose Edit > Quick Apply, or press Ctrl+Enter (Windows) or Command+Return (Mac OS).

3 Start typing the name of the item you want to apply.

The name you type doesn't need to be an exact match. For example, typing **he** will locate styles such as Head 1, Head 2, and Subhead, as well as Help menu commands such as Help Menu > InDesign Help.



Use Quick Apply to find styles, menu commands, scripts, and variables.

*You can narrow the search to only a single category by typing the appropriate prefix at the beginning of the search, such as **m:** for menu or **p:** for paragraph styles. To view a list of prefixes, click the down arrow to the left of the Quick Apply text box. You can deselect categories in this list that you don't want to appear.*

4 Select the item you want to apply, and then:

- To apply a style, menu command, or variable, press Enter or Return.
- To apply a paragraph style and remove overrides, press Alt+Enter (Windows) or Option+Return (Mac OS).
- To apply a paragraph style and remove overrides and character styles, press Alt+Shift+Enter (Windows) or Option+Shift+Return (Mac OS).
- To apply an item without closing the Quick Apply list, press Shift+Enter (Windows) or Shift+Return (Mac OS).
- To close the Quick Apply list without applying an item, press Esc or click anywhere else in the document window.
- To edit a style, press Ctrl+Enter (Windows) or Command+Return (Mac OS).

When the Quick Apply list is displayed, press the left and right arrow keys to scroll through the edit field; press the up and down arrow keys to scroll through the list of items.

Using fonts

About fonts

A *font* is a complete set of characters—letters, numbers, and symbols—that share a common weight, width, and style, such as 10-pt Adobe Garamond Bold.

Typefaces (often called *type families* or *font families*) are collections of fonts that share an overall appearance, and are designed to be used together, such as Adobe Garamond.

A *type style* is a variant version of an individual font in a font family. Typically, the *Roman* or *Plain* (the actual name varies from family to family) member of a font family is the base font, which may include type styles such as regular, bold, semibold, italic, and bold italic.

Installing fonts

When you install InCopy or the Adobe Creative Suite, fonts are automatically installed in the system fonts folder—Windows\Fonts in Windows or Library/Fonts in Mac OS. For information on installing and activating fonts to be used in all applications, see your system documentation or your font manager documentation.

You can make fonts available in InCopy by copying the font files into the Fonts folder inside the Adobe® InCopy® CS4 folder on your hard drive. However, fonts in this Fonts folder are available only to InCopy .

If two or more fonts are active in InCopy and use the same family name but have different Adobe PostScript names, the fonts are available in InCopy . Duplicate fonts are listed in the menus with their font technologies abbreviated in parentheses. For example, a Helvetica TrueType font appears as "Helvetica (TT)," a Helvetica PostScript Type 1 font appears as "Helvetica (T1)," and a Helvetica OpenType font appears as "Helvetica (OTF)." If two fonts have the same PostScript name and one includes .dfont in its name, the other font is used.

See also

"Installing OpenType fonts" on page 186

Apply a font to text

When you specify a font, you can select the font family and its type style independently. When you change from one font family to another, InCopy attempts to match the current style with the style available in the new font family. For example, Arial Bold would change to Times Bold when you change from Arial to Times.

When you apply a bold or italic style to type, InCopy applies the typeface style specified by the font. In most cases, the specific version of bold or italic is applied as expected. However, some fonts may apply a bold or italic variation that isn't exactly labeled bold or italic, respectively. For example, some font designers specify that when you apply bold to a font, the semibold variation is applied.

1. Select the text you want to change.
2. Do any of the following:

- In the Character panel or Control panel, select a font in the Font Family menu or a style in the Type Style menu. (In Mac OS, you can select type styles in the Font Family submenus.)
- In the Character panel or Control panel, click in front of the font family name or type style name (or double-click its first word) and type in the first few characters of the name you want. As you type, InCopy displays font family or type style names that match the characters you've typed.
- Choose a font in the Type > Font menu. Note that you choose both a font family and a type style when you use this menu.

Specify a typeface size

By default, typeface size is measured in *points* (a point equals 1/72 of an inch). You can specify any typeface size from 0.1 to 1296 points, in 0.001-point increments.

1. Select the characters or type objects you want to change. If you don't select any text, the typeface size applies to new text you create.
2. Do one of the following:

- In the Character panel or Control bar set the Font Size option.
- Choose a size from the Type > Size menu. Choosing Other lets you type a new size in the Character panel.

You can change the unit of measurement for type in the Preferences dialog box.

Previewing fonts

You can view samples of a font in the font family and font style menus in the Character panel and other areas in the application from where you can choose fonts. The following icons are used to indicate different kinds of fonts:

- OpenType
- Type 1
- TrueType
- Multiple Master
- Composite

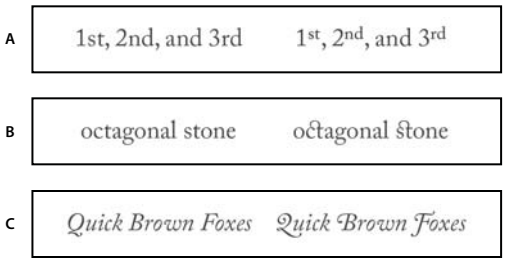
You can turn off the preview feature or change the point size of the font names or font samples in Type preferences.

OpenType fonts

OpenType fonts use a single font file for both Windows® and Macintosh® computers, so you can move files from one platform to another without worrying about font substitution and other problems that cause text to reflow. They may include a number of features, such as swashes and discretionary ligatures, that aren't available in current PostScript and TrueType fonts.

OpenType fonts display the icon.

When working with an OpenType font, you can automatically substitute alternate glyphs, such as ligatures, small capitals, fractions, and old style proportional figures, in your text.



Regular (left) and OpenType (right) fonts
***A.** Ordinals **B.** Discretionary ligatures **C.** Swashes*

OpenType fonts may include an expanded character set and layout features to provide richer linguistic support and advanced typographic control. OpenType fonts from Adobe that include support for central European (CE) languages include the word "Pro," as part of the font name in application font menus. OpenType fonts that don't contain central European language support are labeled "Standard," and have an "Std" suffix. All OpenType fonts can also be installed and used alongside PostScript Type 1 and TrueType fonts.

For more information on OpenType fonts, see www.adobe.com/go/opentype.

Installing OpenType fonts

InCopy includes fonts from various OpenType families, including Adobe Garamond Pro, Adobe Caslon Pro, Trajan Pro, Caflisch Script Pro, Myriad Pro, Lithos, and Adobe Jenson Pro.

OpenType fonts are installed automatically when you install InCopy or Adobe Creative Suite 4. Additional OpenType fonts are located in the Adobe Fonts folder in the Goodies folder on the application DVD. For information on installing and using OpenType fonts, browse the application DVD or see the Adobe website.

See also

"Installing fonts" on page 185

Apply OpenType font attributes

Use the Character panel or Control panel to apply OpenType font attributes, such as fractions and swashes to text.

For more information on OpenType fonts, see www.adobe.com/go/opentype.

See also

"Insert glyphs and special characters" on page 104

"OpenType fonts" on page 186

Apply OpenType font attributes

1 Select text.

2 In the Character panel or Control panel, make sure that an OpenType font is selected.

3 Choose OpenType from the Character panel menu, and then select an OpenType attribute, such as Discretionary Ligatures or Fractions.

Features not supported in the current font appear in square brackets, such as [Swash].

You can also select OpenType font attributes when defining a paragraph or character style. Use the OpenType Features section of the Style Options dialog box.

OpenType font attributes

When you use an OpenType font, you can select specific OpenType features from the Control panel or Character panel menu when formatting text or when defining styles.

Note: *OpenType fonts vary greatly in the number of type styles and kinds of features they offer. If an OpenType feature is unavailable, it's surrounded in square brackets (such as [Swash]) in the Control panel menu.*

Discretionary Ligatures Font designers may include optional ligatures that shouldn't be turned on in all circumstances. Selecting this option allows these additional optional ligatures to be used, if they are present. For more information on ligatures, see "Apply ligatures to letter pairs" on page 195.

Fractions Numbers separated by a slash (such as 1/2) are converted to a fraction character, when fractions are available.

Ordinal Ordinal numbers such as *1st* and *2nd* are formatted with superscript letters (1st and 2nd) when ordinals are available. Letters such as the superscript *a* and *o* in the Spanish words *segunda* (2ª) and *segundo* (2º) are also typeset properly.

Swash When available, regular and contextual swashes, which may include alternate caps and end-of-word alternatives, are provided.

Titling Alternatives When available, characters used for uppercase titles are activated. In some fonts, selecting this option for text formatted in both uppercase and lowercase letters can yield undesired effects.

Contextual Alternatives When available, contextual ligatures and connecting alternates are activated. Alternate characters are included in some script typefaces to provide better joining behavior. For example, the letter pair "bl" in the word "bloom" can be joined so that it looks more like handwriting. This option is selected by default.

All Small Caps For fonts that include real small caps, selecting this option turns characters into small caps. For more information, see "Change the case of type" on page 197.

Slashed Zero Selecting this options displays the number *0* with a diagonal slash through it. In some fonts (especially condensed fonts), it can be difficult to distinguish between the number *0* and the capital letter *O*.

Stylistic Sets Some OpenType fonts include alternate glyph sets designed for esthetic effect. A *stylistic set* is a group of glyph alternates that can be applied one character at a time or to a range of text. If you select a different stylistic set, the glyphs defined in the set are used instead of the font's default glyphs. If a glyph character in a stylistic set is used in conjunction with another OpenType setting, the glyph from the individual setting overrides the character set glyph. You can see the glyphs for each set using the Glyphs panel.

Positional Forms In some cursive scripts and in languages such as Arabic, what a character looks like can depend on its position inside a word. The character may change form when it appears at the start (initial position), middle (medial position), or end (final position) of a word, and it may change form as well when it appears alone (isolated position). Select a character and choose a Positional Forms option to format it correctly. The General Form option inserts the common character; the Automatic Form option inserts a form of the character according to where the character is located in the word and whether the character appears in isolation.

Superscript/Superior & Subscript/Inferior Some OpenType fonts include raised or lowered glyphs that are sized correctly relative to the surrounding characters. If an OpenType font doesn't include these glyphs for non-standard fractions, consider using the Numerator and Denominator attributes.

Numerator & Denominator Some OpenType fonts convert only basic fractions (such as 1/2 or 1/4) to fraction glyphs, not non-standard fractions (such as 4/13 or 99/100). Apply Numerator and Denominator attributes to these non-standard fractions in such cases.

Tabular Lining Same widths are provided for full-height figures. This option is appropriate in situations where numbers need to line up from one line to the next, as in tables.

Proportional Oldstyle Varying-height figures with varying widths are provided. This option is recommended for a classic, sophisticated look in text that doesn't use all caps.

Proportional Lining Full-height figures with varying widths are provided. This option is recommended for text that uses all caps.

Tabular Oldstyle Varying-height figures with fixed, equal widths are provided. This option is recommended when you want the classic appearance of old-style figures, but you need them to align in columns, as in an annual report.

Default Figure Style Figure glyphs use the default figure style of the current font.

Work with missing fonts

When you open or place documents that include fonts not installed on your system, an alert message appears, indicating which fonts are missing. If you select text that uses a missing font, the Character panel or Control panel indicates that this font is missing by displaying it in brackets in the font style pop-up menu.

InCopy substitutes missing fonts with an available font. When this happens, you can select the text and apply any other available font. Missing fonts for which others have been substituted will appear at the top of the Type > Font menu in a section marked "Missing Fonts." By default, text formatted with missing fonts appears in pink highlighting.

If a TrueType font is installed and the document contains a Type 1 (T1) version of the same font, the font is displayed as missing.

You can choose Type > Find Font to find and change missing fonts. If a missing font is part of a style, you can update the font in that style by changing its style definition.

See also

"Find and change fonts" on page 122

"Installing fonts" on page 185

Make missing fonts available

❖ Do any of the following:

- Install the missing fonts on your system.
- Place the missing fonts in the Fonts folder, which is located in the InCopy application folder. Fonts in this folder are available only to InCopy . See "Installing fonts" on page 185.
- Activate the missing fonts using a font-management application.

If you don't have access to the missing fonts, use the Find Font command to search for and replace missing fonts.

Highlight substituted fonts in your document

If the Select Substituted Fonts preferences option is selected, text formatted with missing fonts appears in pink highlighting so that you can easily identify text formatted with a missing font.

1 Choose Edit > Preferences > Composition (Windows®) or InCopy > Preferences > Composition (Mac OS®).

2 Select Substituted Fonts, and then click OK.

Multiple master fonts

Multiplemaster fonts are customizable Type 1 fonts whose typeface characteristics are described in terms of variable design axes, such as weight, width, style, and optical size.

Some multiple master fonts include an optical size axis, which lets you use a font specifically designed for optimal readability at a particular size. Generally, the optical size for a smaller font, such as 10 point, is designed with heavier serifs and stems, wider characters, less contrast between thick and thin lines, taller x height, and looser spacing between letters than the optical size for a larger font, such as 72 point.

1 Choose Edit > Preferences > Type (Windows) or InCopy > Preferences > Type (Mac OS).

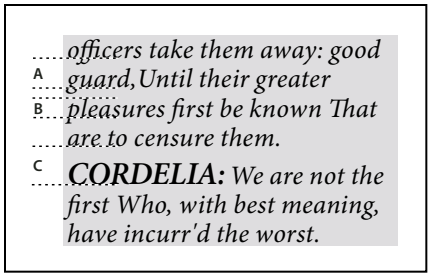
2 Select Automatically Use Correct Optical Size, and click OK.

Leading

About leading

The vertical space between lines of type is called *leading*. Leading is measured from the baseline of one line of text to the baseline of the line above it. *Baseline* is the invisible line on which most letters—that is, those without descenders—sit.

The default auto-leading option sets the leading at 120% of the type size (for example, 12-point leading for 10-point type). When auto-leading is in use, InCopy displays the leading value in parentheses in the Leading menu of the Character panel.



Leading
A. *Leading* ***B.*** *Text height* ***C.*** *Larger text size of one word increases leading for that one line.*

Change leading

By default, leading is a character attribute, which means that you can apply more than one leading value within the same paragraph. The largest leading value in a line of type determines the leading for that line. However, you can select a preferences option so that leading applies to the entire paragraph, instead of to text within a paragraph. This setting does not affect the leading in existing frames.

Change leading of selected text

1 Select the text you want to change.

2 Do any of the following:

- In the Character panel or Control panel, choose the leading you want from the Leading menu .
- Select the existing leading value and type a new value.
- While creating a paragraph style, change the leading using the Basic Character Formats panel.

You can also adjust vertical space by aligning text to the baseline grid. When baseline grid is set, the baseline grid setting takes precedence over the leading value.

Change the default leading percentage

1 Select the paragraphs that you want to change.

2 Choose Justification from the Paragraph panel menu or from the Control panel menu.

3 For Auto Leading, specify a new default percentage. The minimum value is 0%, and the maximum value is 500%.

Apply leading to whole paragraphs

1 Choose Edit > Preferences > Type (Windows) or InCopy > Preferences > Type (Mac OS).

2 Select Apply Leading To Entire Paragraph, and then click OK.

Note: *When you use a character style to apply leading to text, the leading affects only the text to which the style is applied, not the entire paragraph, regardless of whether the Apply Leading To Entire Paragraph option is selected.*

Kerning and tracking

About kerning and tracking

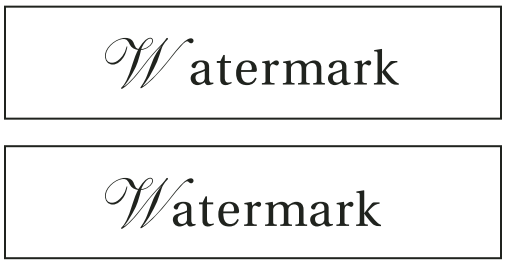
Kerning is the process of adding or subtracting space between specific pairs of characters. *Tracking* is the process of loosening or tightening a block of text.

Types of kerning

You can automatically kern type using metrics kerning or optical kerning. *Metrics kerning* uses kern pairs, which are included with most fonts. Kern pairs contain information about the spacing of specific pairs of letters. Some of these are: LA, P., To, Tr, Ta, Tu, Te, Ty, Wa, WA, We, Wo, Ya, and Yo.

InCopy uses metrics kerning by default so that specific pairs are automatically kerned when you import or type text. To disable metrics kerning, select "0".

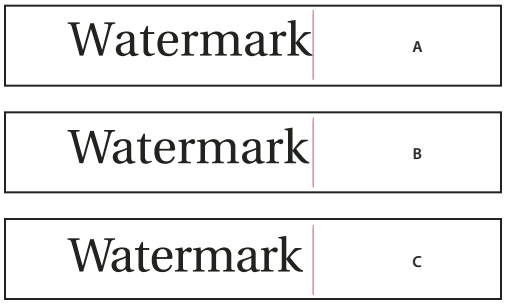
Optical kerning adjusts the spacing between adjacent characters based on their shapes. Some fonts include robust kern-pair specifications. However, when a font includes only minimal built-in kerning or none at all, or if you use two different typefaces or sizes in one or more words on a line, you may want to use the *optical kerning* option.



Before applying the optical kerning option to the "W" and "a" pair (top), and after (bottom)

You can also use *manual kerning,* which is ideal for adjusting the space between two letters. Tracking and manual kerning are cumulative, so you can first adjust individual pairs of letters, and then tighten or loosen a block of text without affecting the relative kerning of the letter pairs.

Word kerning isn't the same as the Word Spacing option in the Justification dialog box; word kerning changes the kerning value only between a specific word's first character and the word space preceding that character.



Kerning and tracking
***A.** Original **B.** Kerning applied between "W" and "a" **C.** Tracking applied*

How kerning and tracking are measured

You can apply kerning, tracking, or both to selected text. Tracking and kerning are both measured in 1/1000 em, a unit of measure that is relative to the current type size. In a 6-point font, 1 em equals 6 points; in a 10-point font, 1 em equals 10 points. Kerning and tracking are strictly proportional to the current type size.

Tracking and manual kerning are cumulative, so you can first adjust individual pairs of letters, and then tighten or loosen a block of text without affecting the relative kerning of the letter pairs.

When you click to place the insertion point between two letters, InCopy displays kerning values in the Character panel and the Control panel. Metrics and optical kerning values (or defined kern pairs) appear in parentheses. Similarly, if you select a word or a range of text, InCopy displays the tracking values in the Character panel and Control panel.

Apply kerning to text

You apply either of two types of automatic kerning: metrics kerning or optical kerning, or you can adjust the spacing between letters manually.

See also

"Keys for working with type" on page 280

Use metrics kerning

1 Set the text insertion point between the characters you want to pair kern, or select text.

2 In the Character panel or Control panel, select Metrics in the Kerning menu.

To avoid using the built-in kerning information of a font for selected text, choose "0" in the Kerning menu.

Use optical kerning

1 Set the text insertion point between characters you want to pair kern or select the text you want to kern.

2 In the Character panel or Control panel, select Optical in the Kerning menu.

Adjust kerning manually

1 Using the Type tool T, click to place an insertion point between two characters.

Note: *If a range of text is selected, you can't manually kern the text (you can choose only Metrics, Optical, or 0). Instead, use tracking.*

2 Do any of the following:

- In the Character panel or the Control panel, type or select a numeric value in the Kerning menu.
- Press Alt+Left/Right Arrow (Windows) or Option+Left/Right Arrow (Mac OS) to decrease or increase the kerning between two characters.

The amount of the word kerning adjustment is the same as the Kerning value in the Units & Increments Preferences dialog box. When you press the shortcut and hold down the Ctrl or Command key, the kerning amount is the Kerning preferences value multiplied by 5.

Change the default kerning increment value

❖ In the Units & Increments section of the Preferences dialog box, type a new value for the Kerning option and click OK.

Turn off kerning for selected text

1 Select text.

2 In the Character panel or Control panel, type or choose 0 in the Kerning menu.

You can also press Alt+Ctrl+Q (Windows) or Option+Command+Q (Mac OS) to reset kerning and tracking. When you do so, kerning is set to Metrics regardless of which kerning option was previously applied.

Adjust tracking

1 Select a range of characters.

2 In the Character panel or Control panel, type or select a numeric value for Tracking.

Highlight text containing custom kerning and tracking

In some instances, you'll want to be aware of text that has custom tracking and kerning applied. If you select the Custom Tracking/Kerning preferences option, green highlighting appears over text with custom tracking or kerning.

1 Choose Edit > Preferences > Composition (Windows) or InCopy > Preferences > Composition (Mac OS).

2 Select Custom Tracking/Kerning, and then click OK.

Adjust kerning between words

❖ With the Type tool T, select a range of text and do one of the following:

- To add space between selected words, press Alt+Ctrl+\ (Windows) or Option+Command+\ (Mac OS).
- To remove space between selected words, press Alt+Ctrl+Backspace (Windows) or Option+Command+Delete (Mac OS).
- To multiply the kerning adjustment by 5, hold down Shift as you press the keyboard shortcut.

Formatting characters

For a video tutorial on formatting characters, see www.adobe.com/go/lrvid4275_id.

Apply baseline shift

Use Baseline Shift to move a selected character up or down relative to the baseline of the surrounding text. This option is especially useful when you're hand-setting fractions or adjusting the position of inline graphics.

Baseline shift values applied to text

1 Select text.

2 In the Character panel or Control panel, type a numeric value for Baseline Shift. Positive values move the character's baseline above the baseline of the rest of the line; negative values move it below the baseline.

To increase or decrease the value, click in the Baseline Shift box, and then press the Up or Down Arrow key. Hold down Shift while you press the Up or Down Arrow key to change the value in greater increments.

To change the default increment for baseline shift, specify a value for Baseline Shift in the Units & Increments section of the Preferences dialog box.

Make characters superscript or subscript in a non-OpenType font

1 Select text.

2 Choose Superscript or Subscript in the Character panel menu or in the Control panel.

When you choose Superscript or Subscript, a predefined baseline shift value and type size are applied to the selected text.

The values applied are percentages of the current font size and leading, and are based on settings in the Type Preferences dialog box. These values do not appear in the Baseline Shift or Size boxes of the Character panel when you select the text.

Note: *You can change the default size and position of superscripts and subscripts using Advanced Type preferences.*

See also

"Apply OpenType font attributes" on page 187

Apply underline or strikethrough

The default weight of an underline and strikethrough depends on the size of the type.

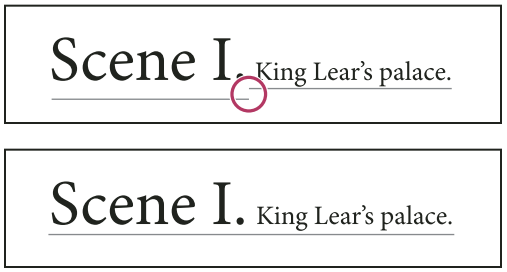
Apply underline or strikethrough

1 Select text.

2 Choose Underline or Strikethrough in the Character panel menu or the Control panel.

Change underline or strikethrough options

Creating custom underlining is especially useful when you want to create an even underline below characters of different sizes, or for creating special effects, such as background highlighting.



Before and after adjusting underlines

1 From the Character panel menu or the Control panel menu, choose Underline Options or Strikethrough Options.

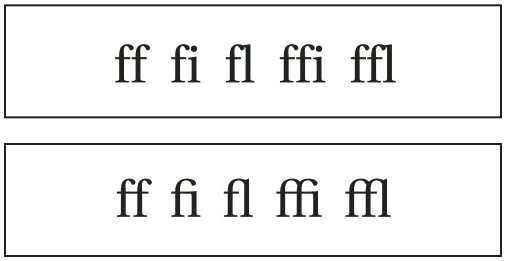
2 Do any of the following, and then click OK:

- Select Underline On or Strikethrough On to turn on underline or strikethrough for the current text.
- For Weight, choose a weight or type a value to determine the thickness of the underline or strikethrough line.
- For Type, select one of the underline or strikethrough options.
- For Offset, determine the vertical position of the line. The offset is measured from the baseline. Negative values move the underline above the baseline and the strikethrough below the baseline.
- Select Overprint Stroke when you want to make sure that the stroke doesn't knock out underlying inks on a printing press.
- Choose a color and tint. If you specified any line type other than solid, choose a gap color or gap tint to change the appearance of the area between dashes, dots, or lines.
- Select Overprint Stroke or Overprint Gap if the underline or strikethrough will be printed over another color, and you want to avoid errors that can occur with printing misregistration.

To change the underline or strikethrough options in a paragraph or character style, use the Underline Options or Strikethrough Options section of the dialog box that appears when you create or edit the style.

Apply ligatures to letter pairs

InDesign can automatically insert *ligatures*, which are typographic replacement characters for certain letter pairs, such as “fi” and “fl,” when they are available in a given font. The characters that InDesign uses when the Ligature option is selected appear and print as ligatures, but are fully editable, and do not cause the spell checker to flag a word erroneously.



Individual characters (top) and ligature combinations (bottom)

With OpenType fonts, when you choose Ligatures from the Character panel menu or Control panel menu, InDesign produces any standard ligature defined in the font, as determined by the font designer. However, some fonts include more ornate, optional ligatures, which can be produced when you choose the Discretionary Ligatures command.

1 Select text.

2 Choose Ligatures from the Character panel menu or the Control panel menu.

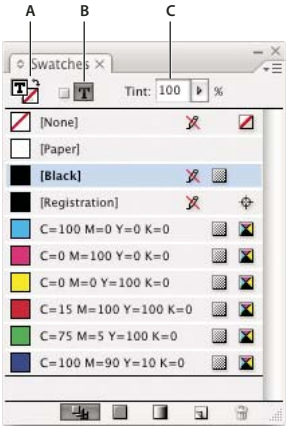
See also

“OpenType fonts” on page 186

Change the color and gradient of text

You can apply colors and gradients to the stroke and fill of characters with the Swatches panel. For a linked story, you can apply any colors or gradients defined by the linked InDesign layout. For a stand-alone story, you can apply any of the default colors or new colors you create for the document.

Note: *You cannot create gradients in InCopy. Gradients only appear when imported from InDesign.*



Swatches
A. *Swatch affects fill or stroke* ***B.*** *Swatch affects container or text* ***C.*** *Tint percentage*

Change the color of text

1 Using the Type tool T , select the text you want to color.

2 In the Swatches panel (choose Window > Swatches), click a color or gradient swatch.

Note: *You can apply colors to text in either Galley, Story, or Layout view; however, color changes are visible only in Layout view.*

Specify the type of swatches to display

1 Choose Window > Swatches to open the Swatches panel.

2 At the bottom of the panel, specify one of the following:

- To see all color, tint, and gradient swatches, click the Show All Swatches button.
- To see only process color, spot color, and tint swatches, click the Show Color Swatches button.
- To see only gradient swatches, click the Show Gradient Swatches button.

Assign a language to text

Assigning a language to text determines which spelling and hyphenation dictionary is used. Assigning a language does not change the actual text.

1 Do any of the following:

- To apply the language only to selected text, select the text.
- To change the default dictionary used in InDesign, choose the language with no documents open.
- To change the default dictionary for a specific document, open the document, choose Edit > Deselect All, and then choose the language.

2 In the Character panel, choose the appropriate dictionary in the Language menu.

InDesign uses Proximity (and WinSoft for some languages) dictionaries for both spelling and hyphenation. These dictionaries let you specify a different language for as little as a single character of text. Each dictionary contains hundreds of thousands of words with standard syllable breaks. Changing the default language does not affect existing text frames or documents.

You can customize language dictionaries to ensure that any unique vocabulary you use is recognized and treated correctly.

A Did you purchase the Glock-enspiel?

B Did you purchase the Glocken-spiel?

C Did you purchase the Glo-ckenspiel?

How dictionaries affect hyphenation
A. *"Glockenspiel" in English* ***B.*** *"Glockenspiel" in Traditional German* ***C.*** *"Glockenspiel" in Reformed German*

See also

"Hyphenation and spelling dictionaries" on page 159

Change the case of type

The All Caps or Small Caps commands change the appearance of text, but not the text itself. Conversely, the Change Case command changes the case setting of selected text. This distinction is important when searching or spell-checking text. For example, suppose you type "spiders" in your document and apply All Caps to the word. Using Find/Change (with Case Sensitive selected) to search for "SPIDERS" will not find the instance of "spiders" to which All Caps was applied. To improve search and spell-check results, use the Change Case command rather than All Caps.

Change text to All Caps or Small Caps

InDesign can automatically change the *case* of selected text. When you format text as small caps, InDesign automatically uses the small-cap characters designed as part of the font, if available. Otherwise, InDesign *synthesizes* the small caps using scaled-down versions of the regular capital letters. The size of synthesized small caps is set in the Type Preferences dialog box.

500 BC to AD 700

500 BC to AD 700

Before (top) and after (bottom) setting BC and AD in small caps to complement old-style numerals and surrounding text

If you select All Caps or Small Caps in an OpenType font, InDesign creates more elegant type. If you're using an OpenType font, you can also choose All Small Caps from the Character panel menu or the Control panel. (See "Apply OpenType font attributes" on page 187.)

1 Select text.

2 Choose All Caps or Small Caps in the Character panel menu or in the Control panel. If the text was originally typed in all caps, selecting Small Caps will not change the text.

Specify the size for small caps

1 Choose Edit > Preferences > Advanced Type (Windows) or InCopy > Preferences > Advanced Type (Mac OS).

2 For Small Caps, type a percentage of the original font size for text to be formatted as small caps. Then click OK.

Change capitalization

1 Select text.

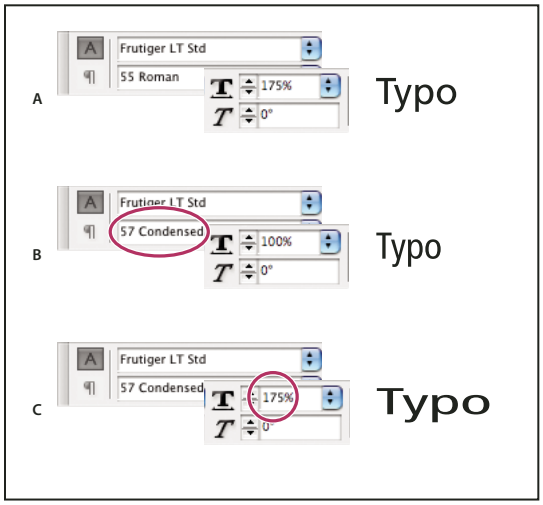
2 Choose one of the following in the Type > Change Case submenu:

- To change all characters to lowercase, choose Lowercase.
- To capitalize the first letter of each word, choose Title Case.
- To change all characters to uppercase, choose Uppercase.
- To capitalize the first letter of each sentence, choose Sentence Case.

Note: *The Sentence Case command assumes that the period (.), exclamation point (!), and question mark (?) characters mark the ends of sentences. Applying Sentence Case may cause unexpected case changes when these characters are used in other ways, as in abbreviations, file names, or Internet URLs. In addition, proper names may become lowercase when they should be uppercase.*

Scale type

You can specify the proportion between the height and width of the type, relative to the original width and height of the characters. Unscaled characters have a value of 100%. Some type families include a true *expanded font*, which is designed with a larger horizontal spread than the plain type style. *Scaling* distorts the type, so it is generally preferable to use a font that is designed as condensed or expanded, if one is available.



Scaling fonts horizontally
A. *Unscaled type* ***B.*** *Unscaled type in condensed font* ***C.*** *Scaled type in condensed font*

Adjust vertical or horizontal scaling

1 Select text you want to scale.

2 In the Character panel or Control panel, type a numeric value to change the percentage of Vertical Scaling or Horizontal Scaling .

Scale text by resizing the text frame in InDesign

❖ Do any of the following:

- Using the Selection tool, hold down Ctrl (Windows) or Command (Mac OS), and then drag a corner of the text frame to resize it.
- Using the Scale tool , resize the frame.

Skew type

1 Select text.

2 In the Character panel, type a numeric value for Skewing . Positive values slant type to the right; negative values slant type to the left.

Note that applying an angle to type does not produce true italic characters.

Formatting paragraphs

For a video tutorial on formatting paragraphs, see www.adobe.com/go/lrvid4276_id.

Adjust paragraph spacing

You can control the amount of space between paragraphs. If a paragraph begins at the top of a column or frame, InCopy does not insert extra space before the paragraph. In such a case, you can increase the leading of the first line of the paragraph or increase the top inset of the text frame in InDesign.

1 Select text.

2 In the Paragraph panel or the Control panel, adjust the appropriate values for Space Before and Space After .

To ensure formatting consistency, change paragraph spacing in the paragraph styles you define.

See also

"Add paragraph and character styles" on page 167

Use drop caps

You can add drop caps to one or more paragraphs at a time. The drop cap's baseline sits one or more lines below the baseline of the first line of a paragraph.

You can also create a character style that can be applied to the drop-cap characters. For example, you can create a tall cap (also called a *raised cap*) by specifying a 1-line, 1-character drop cap and applying a character style that increases the size of the first letter.

One-character, three-line drop cap (left), and five-character, two-line drop cap (right)

See also

"Drop caps and nested styles" on page 174

"Apply a character style to a drop cap" on page 174

Create a drop cap

1 With the Type tool T selected, click in the paragraph where you want the drop cap to appear.

2 In the Paragraph panel or Control panel, type a number for Drop Cap Number Of Lines to indicate the number of lines you want the drop cap to occupy.

3 For Drop Cap One Or More Characters , type the number of drop cap characters you want.

4 To apply a character style to the drop cap character, choose Drop Caps And Nested Styles from the Paragraph panel menu, and then choose the character style you created.

You can also use the Drop Caps And Nested Styles dialog box to align the drop cap to the text edge, reducing the amount of space on the left side of the drop cap, and adjust for drop cap letters with descenders, such as "g" and "y." If you want to resize, skew, or change the typeface of the drop cap letter for added effect, select the letter or letters and make the formatting changes.

Remove a drop cap

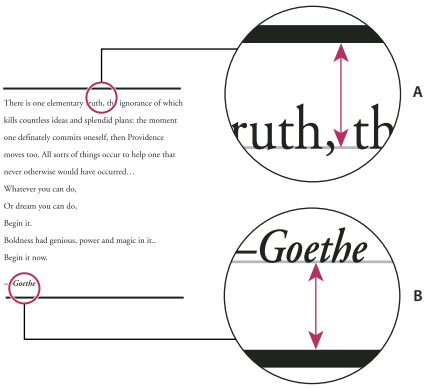
1 With the Type tool T selected, click in the paragraph where the drop cap appears.

2 In the Paragraph panel or Control panel, type **0** for Drop Cap Number Of Lines or Drop Cap Number Of Characters.

Add rules (lines) above or below paragraphs

Rules are paragraph attributes that move and are resized along with the paragraph on the page. If you're using a rule with headings in your document, you may want to make the rule part of a paragraph style definition. The width of the rule is determined by the column width.

The offset for a rule above a paragraph is measured from the baseline of the top line of text to the bottom of the rule. The offset for a rule below a paragraph is measured from the baseline of the last line of text to the top of the rule.



Placement of rules
A. *Rule above paragraph* ***B.*** *Rule below paragraph*

Add a rule above or below a paragraph

1 Select text.

2 Choose Paragraph Rules from the Paragraph panel menu or Control panel menu.

3 At the top of the Paragraph Rule dialog box, select Rule Above or Rule Below.

4 Select Rule On.

Note: *If you want both a rule above and below, make sure that Rule On is selected for both Rule Above and Rule Below.*

5 Select Preview to see what the rule will look like.

6 For Weight, choose a weight or type a value to determine the thickness of the rule. For Rule Above, increasing the weight expands the rule upwards. For Rule Below, increasing the weight expands the rule downward.

7 Select Overprint Stroke when you want to make sure that the stroke doesn't knock out underlying inks on a printing press.

8 Do one or both of the following:

- Choose a color. The available colors are those listed in the Swatches panel. Select the Text Color option to make the rule the same color as the first character in the paragraph for Rule Above and the last character for Rule Below.
- Choose a tint or specify a tint value. The tint is based on the color you specified. Note that you can't create tints of the built-in colors None, Paper, Registration, or Text Color.

- If you specified any line type other than solid, choose a gap color or gap tint to change the appearance of the area between dashes, dots, or lines.

9 Choose the width of the rule. You can choose either Text (from the left edge of text to the line end) or Column (from the left edge of the column to the right edge of the column). If the left edge of the frame has a column inset, the rule begins at the inset.

10 To determine the vertical position of the rule, type a value for Offset.

11 To make sure that the rule above text is drawn within the text frame, select Keep Within Frame. If this option isn't selected, the rule can appear outside the text frame.

12 Set left or right indents for the rule (not for text) by typing values for Left Indent and Right Indent.

13 Select Overprint Stroke if the paragraph rule will be printed over another color and you want to avoid errors that can occur with printing misregistration. Then click OK.

Remove a paragraph rule

1 Using the Type tool T , click in the paragraph containing the paragraph rule.

2 Choose Paragraph Rules from the Paragraph panel menu or Control panel menu.

3 Deselect Rule On and click OK.

Ways to control paragraph breaks

You can eliminate orphans and widows, words or single lines of text that become separated from the other lines in a paragraph. *Orphans* fall at the bottom of a column or page, and *widows* fall at the top of a column or page. Another typographic problem to avoid is a heading that stands alone on a page with the following paragraph on the next page. You have several options for fixing widows, orphans, short exit lines, and other paragraph break problems:

Discretionary hyphens A discretionary hyphen (Type > Insert Special Character > Hyphens And Dashes > Discretionary Hyphen) appears only if the word breaks. This option prevents the common typographic problem of hyphenated words, such as "care-giver," appearing in the middle of a line after text reflows. Similarly, you can also add a discretionary line break character.

No Break Choose No Break from the Character panel menu to prevent selected text from breaking across a line.

Nonbreaking spaces Insert a nonbreaking space (Type > Insert White Space > *[nonbreaking space]*) between words you want to keep together.

Keep Options Choose Keep Options from the Paragraph panel menu to specify how many lines in the following paragraph remain with the current paragraph.

Start Paragraph Use Start Paragraph in the Keep Options dialog box to force a paragraph (usually a title or heading) to appear at the top of a page, column, or section. This option works especially well as part of a heading paragraph style.

Hyphenation Settings Choose Hyphenation from the Paragraph panel menu to change hyphenation settings.

Edit text Editing text may not be an option depending on the kind of document you work with. If you have license to rewrite, then subtle rewording can often create a better line break.

Use a different composer In general, use Adobe Paragraph Composer to let InDesign compose paragraphs automatically. If a paragraph isn't composed the way you'd like, choose Adobe Single-line Composer from the Paragraph panel menu or Control panel menu and adjust selected lines individually. See "Compose text" on page 221.

Control paragraph breaks using Keep Options

You can specify how many lines of the following paragraph remain with the current paragraph as it moves between frames—a convenient way to ensure that headings don't become isolated from the body text they introduce. InDesign can highlight the paragraphs that sometimes break in violation of your settings.

You may not want to use Keep Options if your document does not require your columns to share the same last baseline.

To highlight paragraphs that violate Keep Options, choose Edit > Preferences > Composition (Windows) or InCopy > Preferences > Composition (Mac OS), select Keep Violations, and click OK.

1 Select the paragraph or paragraphs you want to affect.

2 Choose Keep Options in the Paragraph panel menu or Control panel menu. (You can also change keep options when creating or editing a paragraph style.)

3 Select any of these options and then click OK:

- For Keep With Next _ Lines, specify the number of lines (up to five) of the subsequent paragraph that the last line of the current paragraph stays with. This option is especially useful for making sure that a heading stays with the next few lines of the paragraph that follows it.
- Select the Keep Lines Together option and select All Lines In Paragraph to prevent the paragraph from breaking.
- Select the Keep Lines Together option, select At Start/End Of Paragraph, and specify the number of lines that must appear at the beginning or ending of the paragraph to prevent orphans and widows.
- For Start Paragraph, choose an option to force InDesign to push the paragraph to the next column, frame, or page. If Anywhere is selected, the start position is determined by the Keep Line Settings option. For other options, they will be forced to start from these positions.

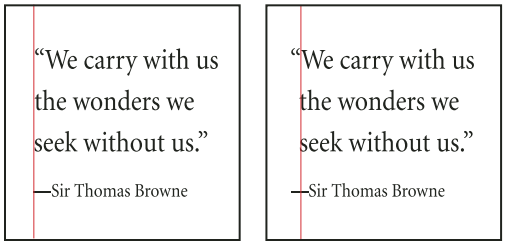
When you create paragraph styles for headings, use the Keep Options panel to make sure that your headings remain with the paragraph that follows them.

See also

"Add column, frame, and page breaks" on page 98

Create hanging punctuation

Punctuation marks and letters such as "W" can make the left or right edges of a column appear to be misaligned. Optical Margin Alignment controls whether punctuation marks (such as periods, commas, quotation marks, and dashes) and edges of letters (such as W and A) hang outside the text margins, so that the type looks aligned.



Before (left) and after (right) applying Optical Margin Alignment

1 Select a text frame, or click anywhere in the story.

2 Choose Type > Story.

3 Select Optical Margin Alignment.

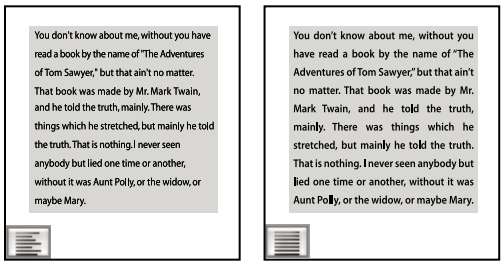
4 Select a font size to set the appropriate amount of overhang for the size of type in your story. For optimal results, use the same size as the text.

To turn off Optical Margin Alignment for an individual paragraph, choose Ignore Optical Margin from the Paragraph panel menu or Control panel menu.

Aligning text

Align or justify text

Text can be aligned with one or both edges (or *insets*) of a text frame. Text is said to be *justified* when it is aligned with both edges. You can choose to justify all text in a paragraph excluding the last line (Justify Left or Justify Right), or you can justify text in a paragraph including the last line (Justify All). When you have only a few characters on the last line, you may want to use a special end-of-story character and create a flush space.



Justify Left (left) and Justify All (right)

Note: *When you justify all lines of text and you are using the Adobe Paragraph Composer, InDesign shifts text to ensure that the paragraph has consistent text density and is visually appealing. You can fine-tune spacing in justified text.*

1 Select text.

2 Click one of the Alignment buttons (Align Left, Align Center, Align Right, Left Justify, Center Justify, Right Justify and Full Justify) in the Paragraph panel or Control panel.

3 (Optional) Click Align Towards Spine or Align Away From Spine.

When you apply Align Towards Spine to a paragraph, text on a left-hand page is right-aligned, but when the same text flows onto (or if the frame is moved to) a right-hand page, it becomes left aligned. Similarly, when you apply Align Away From Spine to a paragraph, text on a left-hand page is left aligned, while text on a right-hand page is right aligned.

If you want the left side of a line of text to be left-aligned and the right side to be right-aligned, position the insertion point where you want to right-align the text, press Tab, and then right-align the rest of the line.

See also

"Change Justification settings" on page 223

Align paragraphs to a baseline grid

The baseline grid represents the leading for body text in a document. You can use multiples of this leading value for all elements of the page to ensure that text always lines up between columns and from page to page. For example, if the body text in your document has 12-point leading, you could give your heading text 18-point leading and add 6 points of space before the paragraphs that follow the headings.

Using a baseline grid ensures consistency in the location of text elements on a page. You can adjust the leading for the paragraph to ensure that its baselines align to the page's underlying grid. This is useful if you want the baselines of text in multiple columns or adjacent text frames to align. Change settings for the baseline grid by using the Grids section of the Preferences dialog box.

You can also align only the first line of a paragraph to the baseline grid, allowing the rest of the lines to follow the specified leading values.

To view the baseline grid, choose View > Grids & Guides > Show Baseline Grid.

Note: *The baseline grid is visible only if the document zoom level is greater than the view threshold setting in Grids Preferences. You may need to zoom in to view the baseline grid.*

Align paragraphs to the baseline grid

1 Select text.

2 In the Paragraph panel or Control panel, click Align To Baseline Grid .

To ensure that the leading of your text does not change, set the baseline grid leading to the same leading value as your text, or to a factor thereof.

Align only the first line to the baseline grid

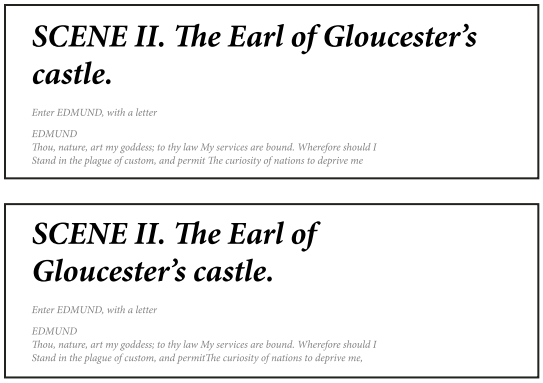
1 Select the paragraphs you want to align.

2 Choose Only Align First Line To Grid from the Paragraph menu or Control panel menu.

3 In the Paragraph panel or Control panel, click Align To Baseline Grid .

Create balanced headline text

You can balance ragged aligned text across multiple lines. This feature is especially useful for multiline headings, pull-quotes, and centered paragraphs.



Before and after applying Balance Ragged Lines to the title

1 Click in the paragraph you want to balance.

2 In the Paragraph panel or Control panel, choose Balance Ragged Lines from the menu.

This feature takes effect only when the Adobe Paragraph Composer is selected.

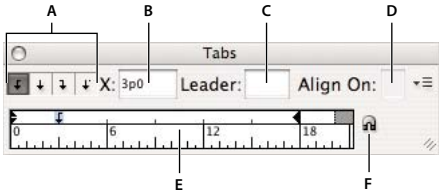
Tabs and indents

Tabs dialog box overview

Tabs position text at specific horizontal locations in a frame. The default tab settings depend on the Horizontal ruler units setting in the Units & Increments preferences dialog box.

Tabs apply to an entire paragraph. The first tab you set deletes all default tab stops to its left. Subsequent tabs delete all default tabs between the tabs you set. You can set left, center, right, and decimal or special-character tabs.

You set tabs using the Tabs dialog box.



Tabs dialog box
A. *Tab alignment buttons* ***B.*** *Tab position* ***C.*** *Tab Leader box* ***D.*** *Align On box* ***E.*** *Tab ruler* ***F.*** *Snap above frame*

Open the Tabs dialog box

1 Using the Type tool, click in the text frame.

2 Choose Type > Tabs.

If the top of the frame is visible, the Tabs dialog box snaps to the current text frame and matches its width to the current column.

Align the Tabs dialog box ruler with your text

1 In Layout View, scroll through your document to display the top of the content.

2 Click the magnet icon on the Tabs dialog box. The Tabs dialog box snaps to the top of the column that includes the selection or the insertion point.

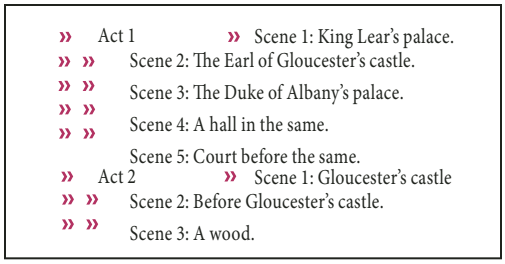
Set tabs

You can set left, center, right, and decimal or special-character tabs. When you use the special-character tab, you can set a tab to align to any character you choose, such as a colon or a dollar sign.

1 To see the effect of changing tab settings, choose View > Layout View.

2 Using the Type tool T, click an insertion point in the paragraph.

3 Press the Tab key. Add tabs in the paragraphs where you want to add horizontal space. (You can also add tabs after you create your tab settings.)



Using tabs to align text

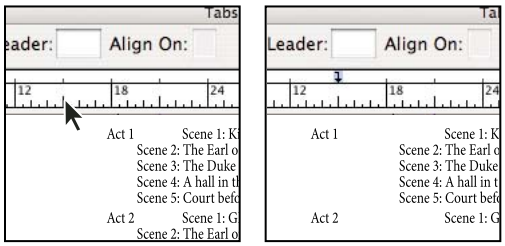
4 To specify which paragraphs will be affected, select a paragraph or a group of paragraphs.

Note: *In Galley view and Story view, adding a tab at the beginning of the paragraph indents the text the same amount, regardless of the tab position. Layout view shows the actual distance of the tab.*

5 For the first tab, click a tab-alignment button (left, right, center, or decimal) in the Tabs dialog box to specify how text will align to the tab's position.

6 Do one of the following:

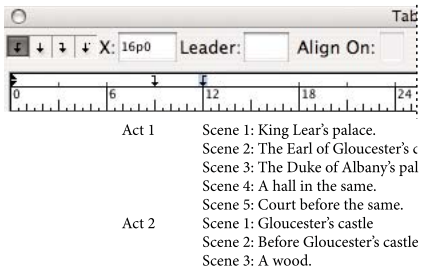
- Click a location on the tab ruler to position a new tab.



Adding a new tab setting

- Type a position in the X box and press Enter or Return. If the X value is selected, press the up or down arrow key to increase or decrease the tab value by 1 point, respectively.

7 For subsequent tabs with different alignments, repeat steps 3 and 4.



The first tab setting is right-aligned; the second tab setting is left-aligned.

To insert a tab character in a table, choose Type > Insert Special Character > Other > Tab.

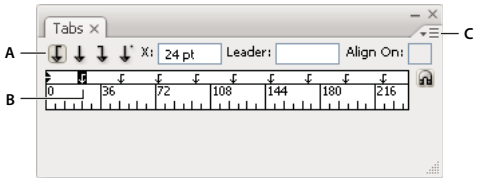
Repeat tabs

The Repeat Tab command creates multiple tabs based on the distance between the tab and the left indent or the previous tab stop.

1 Click an insertion point in the paragraph.

2 In the Tabs panel, select a tab stop on the ruler.

3 Choose Repeat Tab from the panel menu.



Repeated tabs
A. *Tab-alignment buttons* ***B.*** *Tab stop on the ruler* ***C.*** *Panel menu*

Move, delete, and edit tab settings

Use the Tabs dialog box to move, delete, and edit tab settings.

Move a tab setting

1 Using the Type tool T , click an insertion point in the paragraph.

2 In the Tabs dialog box, select a tab on the tab ruler.

3 Do one of the following:

- Type a new location for X and press Enter or Return.
- Drag the tab to a new location.

Delete a tab setting

1 Click an insertion point in the paragraph.

2 Do one of the following:

- Drag the tab off the tab ruler.
- Select the tab, and choose Delete Tab from the panel menu.
- To return to the default tab stops, choose Clear All from the panel menu.

Change a tab from one alignment to another

1 In the Tabs dialog box, select a tab on the tab ruler.

2 Click a tab-alignment button.

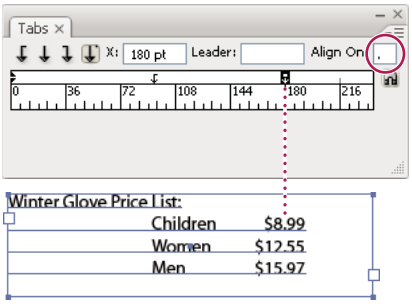
You can also hold down Alt (Windows) or Option (Mac OS) while clicking the tab setting to cycle through the four alignment options.

Specify characters for decimal tabs

You use decimal tabs to align text with a character you specify, such as a period or a dollar sign.

1 In the Tabs panel, create or select a decimal tab on the tab ruler.

2 In the Align On box, type the character to which you want to align. You can type or paste any character. Make sure that the paragraphs you're aligning contain that character.



Text aligned using a decimal tab

Add tab leaders

A *tab leader* is a repeated pattern of characters, such as a series of dots or dashes, between a tab and the following text.

1 In the Tabs panel, select a tab stop on the ruler.

2 Type a pattern of as many as eight characters in the Leader box, and then press Enter or Return. The characters you entered repeat across the width of the tab.

3 To change the font or other formatting of the tab leader, select the tab character in the text frame, and use the Character panel or Type menu to apply formatting.

Insert right indent tabs

In one step, you can add a right-aligned tab at the right indent, making it easier to prepare tabular text that spans an entire column. Right indent tabs are slightly different from regular tabs. A right indent tab:

- Aligns all subsequent text to the right edge of the text frame. If the same paragraph includes any tabs after the right indent tab, those tabs and their text are pushed to the next line.
- Is a special character located in the text, not in the Tabs dialog box. You add a right indent tab using a context menu, not the Tabs dialog box. As a result, a right indent tab can't be part of a paragraph style.
- Is different from the Right Indent value in the Paragraph panel. The Right Indent value keeps the entire right edge of the paragraph away from the right edge of the text frame.
- Can be used with a tab leader. Right indent tabs use the tab leader of the first tab stop past the right margin, or, if there isn't one, the last tab stop before the right margin.

1 Using the Type tool T, click on the line where you want to add the right indent tab.

2 Choose Type > Insert Special Character > Other > Right Indent Tab.

Set indents

Indents move text inward from the right and left edges of the frame. In general, use first-line indents, not spaces or tabs, to indent the first line of a paragraph.

A first-line indent is positioned relative to the left-margin indent. For example, if a paragraph's left edge is indented one pica, setting the first-line indent to one pica indents the first line of the paragraph two picas from the left edge of the frame or inset.

You can set indents using the Tabs dialog box, the Paragraph panel, or the Control panel. You can also set indents when you create bulleted or numbered lists.

See also

"Create bulleted or numbered lists" on page 211

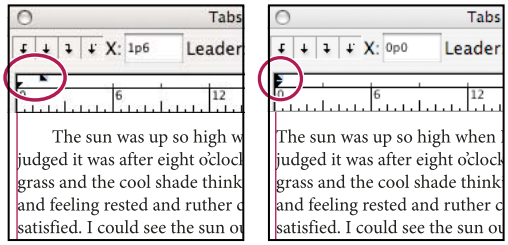
Set an indent using the Tabs dialog box

1 Using the Type tool T , click in the paragraph you want to indent.

2 Choose Type > Tabs to display the Tabs dialog box.

3 Do one of the following to the indent markers in the Tabs dialog box:

- Drag the top marker to indent the first line of text. Drag the bottom marker to move both markers and indent the entire paragraph.



First-line indent (left) and no indent (right)

- Select the top marker and type a value for X to indent the first line of text. Select the bottom marker and type a value for X to move both markers and indent the entire paragraph.

For more information on using the Tabs dialog box, see "Tabs dialog box overview" on page 205.

Set indents using the Paragraph panel or the Control panel

1 Using the Type tool T , click in the paragraph you want to indent.

2 Adjust the appropriate indent values in the Paragraph panel or Control panel. For example, do the following:

- To indent the entire paragraph one pica, type a value (such as **1p**) in the Left Indent box .
- To indent only the first line of a paragraph one pica, type a value (such as **1p**) in the First Line Left Indent box .
- To create a hanging indent of one pica, type a positive value (such as **1p**) in the Left Indent box and type a negative value (such as **-1p**) in the First Line Left Indent box. See "Set indents" on page 208.

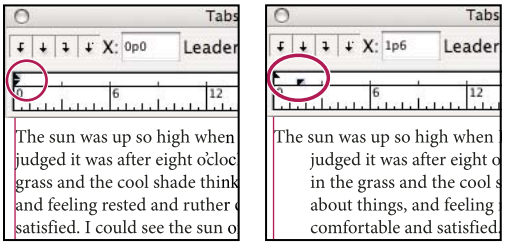
Reset indents

1 Click in the paragraph in which you want to reset indents to the zero mark.

2 Choose Reset Indents from the Tabs dialog box menu.

Create a hanging indent

In a hanging indent, all the lines in a paragraph are indented except for the first line. Hanging indents are especially useful when you want to add inline graphics at the beginning of the paragraph.



No indent (left) and hanging indent (right)

1 Using the Type tool T, click in the paragraph you want to indent.

2 In the Tabs dialog box or the Control panel, specify a left indent value greater than zero.

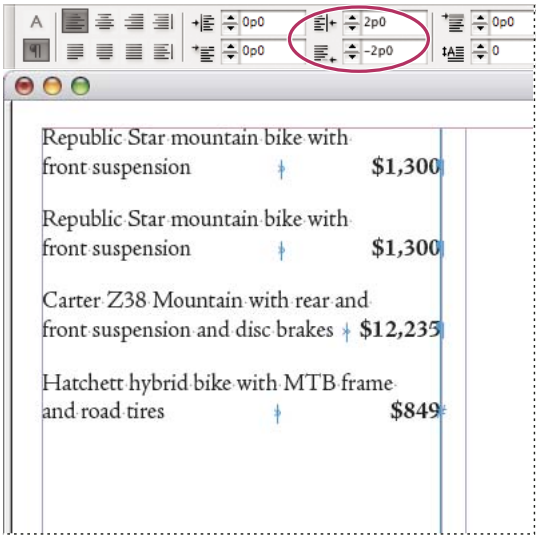
3 To specify a negative first-line left indent value, do one of the following:

- In the Control panel, type a negative value for the first-line left indent.
- In the Tabs dialog box, drag the top marker to the left, or select the marker and type a negative value for X.

In most cases, you'll specify the negative equivalent of the value you entered in step 2; for instance, if you specified a left indent of 2 picas, your first-line left indent will typically be –2 picas.

Right-indent the last line of a paragraph

You can use the Last Line Right Indent option to add a hanging indent on the right side of the last line in a paragraph. This option is especially useful for right-aligning prices in a sales catalog.



Last line right indent

1 Type your paragraphs. In the last line of each paragraph, place the insertion point before the text to be indented, and choose Type > Insert Special Character > Other > Right Indent Tab.

2 Select the paragraphs.

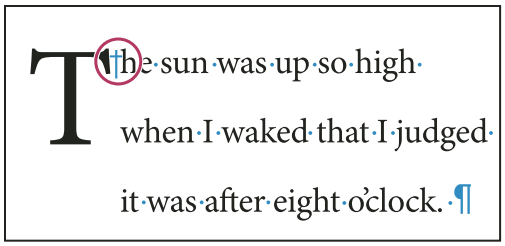
3 To create a right indent for paragraphs, specify a value (such as **2p**) in the Right Indent field of the Paragraph panel or Control panel.

4 To offset the right indent value for the text that follows the tab, type a negative value (such as **-2p**) in the Last Line Right Indent field of the Paragraph panel or Control panel.

Use Indent To Here

You can use the Indent To Here special character to indent lines in a paragraph independently of a paragraph's left indent value. The Indent To Here special character is different from the paragraph's left indent in the following ways:

- Indent To Here is part of the text flow, as if it were a visible character. If text reflows, the indent moves with it.
- Indent To Here affects all lines after the line where you've added its special characters, so you can indent just some of the lines in a paragraph.
- When you choose Type > Show Hidden Characters, the Indent To Here character † is visible.



Indent To Here special character

1 Using the Type tool T, click the insertion point where you would like to indent.

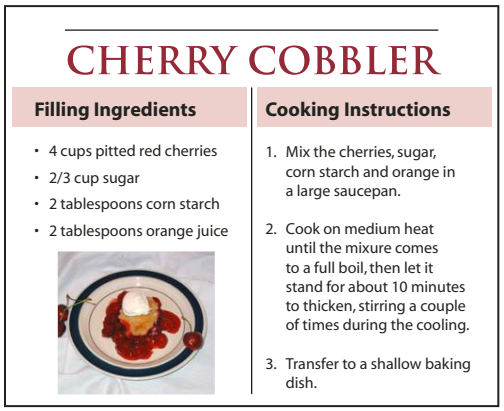
2 Choose Type > Insert Special Character > Other > Indent To Here.

Bullets and numbering

Create bulleted or numbered lists

In bulleted lists, each paragraph begins with a bullet character. In numbered lists, each paragraph begins with an expression that includes a number or letter and a separator such as a period or parenthesis. The numbers in a numbered list are updated automatically when you add or remove paragraphs in the list. You can change the type of bullet or numbering style, the separator, the font attributes and character styles, and the type and amount of indent spacing.

You cannot use the Type tool to select the bullets or numbers in a list. Instead, edit their formatting and indent spacing using the Bullets And Numbering dialog box, the Paragraph panel, or the Bullets And Numbering section of the Paragraph Styles dialog box (if the bullets or numbers are part a style).



Bulleted list and numbered list

Note: *Automatically generated bullet and number characters aren't actually inserted in the text. Therefore, they cannot be found during a text search or selected with the Type tool unless you convert them to text. In addition, bullets and numbering don't appear in the story editor window (except in the paragraph style column).*

For a video tutorial on creating bulleted and numbered lists, see www.adobe.com/go/vid0077.

1 Select the set of paragraphs that will become the list, or click to place the insertion point where you want the list to begin.

2 Do any of the following:

- Click the Bulleted List button or the Numbered List button in the Control panel (in Paragraph mode). Hold down Alt (Windows) or Option (Mac OS) while clicking a button to display the Bullets And Numbering dialog box.
- Choose Bullets And Numbering from the Paragraph panel or Command panel. For List Type, choose either Bullets or Numbers. Specify the settings you want, and then click OK.
- Apply a paragraph style that includes bullets or numbering.

3 To continue the list in the next paragraph, move the insertion point to the end of the list and press Enter or Return.

4 To end the list (or list segment, if the list is to be continued later in the story), click the Bulleted List or Numbered List button in the Control panel again, or choose Bullets And Numbering from the Paragraph panel menu.

See also

"Create a paragraph style for running lists" on page 217

"Create multi-level lists" on page 217

Bulleted and Numbered Lists video

Format a bulleted or numbered list

1 Using the Type tool T, select the bulleted or numbered paragraphs you want to reformat.

2 Do any of the following to open the Bullets And Numbering dialog box:

- Choose Bullets And Numbering from the Control panel menu (in Paragraph mode) or the Paragraph panel menu.
- Alt-click (Windows) or Option-click (Mac OS) either the Bulleted List button or the Numbered List button.

3 In the Bullets And Numbering dialog box, do any of the following:

- Change the bullet character.
- Change the numbered list options.
- Choose a style for the numbers or bullets from the Character Style list.

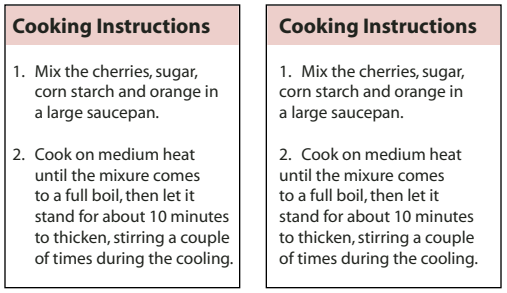
4 To change the position of the bullet or number, specify any of the following:

Alignment Left-aligns, centers, or right-aligns the bullets or numbers within the horizontal space allotted for numbers. (If this space is narrow, the difference between the three options is negligible.)

Left Indent Specifies how far the lines after the first line are indented.

First Line Indent Controls where the bullet or number is positioned.

Tab Position Activates the tab position to create space between the bullet or number and the start of the list item.

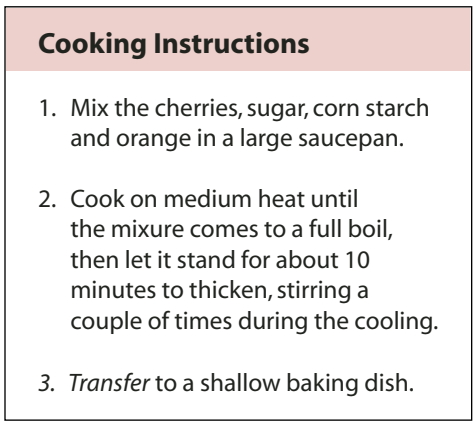


Position settings
A. *Hanging indent* ***B.*** *Left-aligned list*

Note: *The Left Indent, First Line Indent, and Tab Position settings in the Bullets And Numbering dialog box are paragraph attributes. For that reason, changing these settings in the Paragraph panel also changes bulleted and numbered list formats.*

To create the hanging indent effect, specify a positive Left Indent value (such as 2p0), and then specify an equal negative value (such as -2p0) for First Line Indent.

By default, bullets and numbers inherit some of their text formatting from the first character in the paragraph to which they're attached. If the first character in one paragraph is different from the first characters in other paragraphs, the numbering or bullet character may appear inconsistent with the other list items. If this is not the formatting you desire, create a character style for numbers or bullets and apply it to your list by using the Bullets And Numbering dialog box.



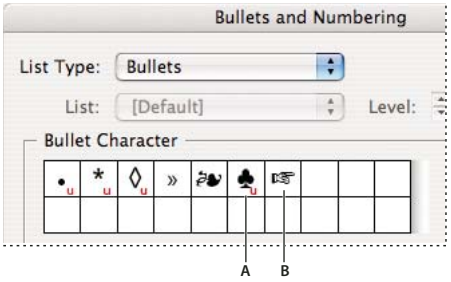
Italicized first word of step 3 causes numbering to be italicized as well, unless you create character style for numbers and apply it to list.

Change bullet characters

If you don't want to use one of the existing bullet characters, you can add other bullet characters to the Bullet Character grid. A bullet character that is available in one font may not be available in another font. You can choose whether the font is remembered with any bullet character you add.

If you want to use a bullet found in a specific font (such as the pointing hand from Dingbats), be sure to set the bullet to remember that font. If you use a basic bullet character, it's probably best not to remember the font, because most fonts have their own version of that bullet character. Depending on whether you select the Remember Font With Bullet option, a bullet you add can reference either a Unicode value and a specific font family and style, or just a Unicode value.

Note: *Bullets that reference only the Unicode value (without a remembered font) appear with a red "u" indicator.*



Bullets And Numbering dialog box
A. *Bullet without remembered font* ***B.*** *Bullet with remembered font*

Change the bullet character

1 On the Control panel menu or Paragraph panel menu, select Bullets And Numbering.

2 In the Bullets And Numbering dialog box, select Bullets from the List Type menu.

3 Select a different bullet character, and then click OK.

Add a bullet character

1 In the Bullets And Numbering dialog box, select Bullets from the List Type menu, then click Add.

2 Select the glyph that you want to use as the bullet character. (Different font families and font styles contain different glyphs.)

3 If you want the new bullet to remember the currently chosen font and style, select Remember Font With Bullet.

4 Click Add.

Note: *The list of bullet characters is stored in the document, like paragraph and character styles. When you paste or load paragraph styles from another document, any bullet character used in those styles appears in the Bullets And Numbering dialog box, along with the other bullets defined for the current document.*

Remove a bullet character

1 In the Bullets And Numbering dialog box, select Bullets from the List Type menu.

2 Select the bullet character you want to remove, and click Delete. (The first preset bullet character cannot be deleted.)

Change numbered list options

In a numbered list, the numbers are updated automatically when you add or remove paragraphs in the list. Paragraphs that are part of the same list are numbered sequentially. These paragraphs do not have to be consecutive to one another as long as you define a list for the paragraphs.

You can also create a multi-level list, in which list items are numbered in outline form and are indented by different degrees.

1 Open the Bullets And Numbering dialog box.

2 Under Numbering Style, select the type of numbering you want to use from the Format menu.

3 In the Number box, use the default expression—period (.) and tab space (^t)—or construct a number expression of your own. To enter a number expression, delete the period after the number metacharacter (^#) and do one of the following:

- Type a character (such as a closing parenthesis) or more than one character in place of the period.
- Choose an item (such as Em Dash or Ellipses) from the Insert Special Character menu.

- Type a word or character before the number metacharacter. For example, to number questions in a list, you can type the word **Question**.

4 Choose a character style for the expression. (The style you choose applies to the entire number expression, not just to the number.)

5 For Mode, choose one of the following options:

Continue From Previous Number Numbers lists sequentially.

Start At Starts numbering at a number or other value that you enter in the text box. Enter a number, not a letter, even if your list uses letters or Roman numerals for numbering.

6 Specify any other options, and then click OK.

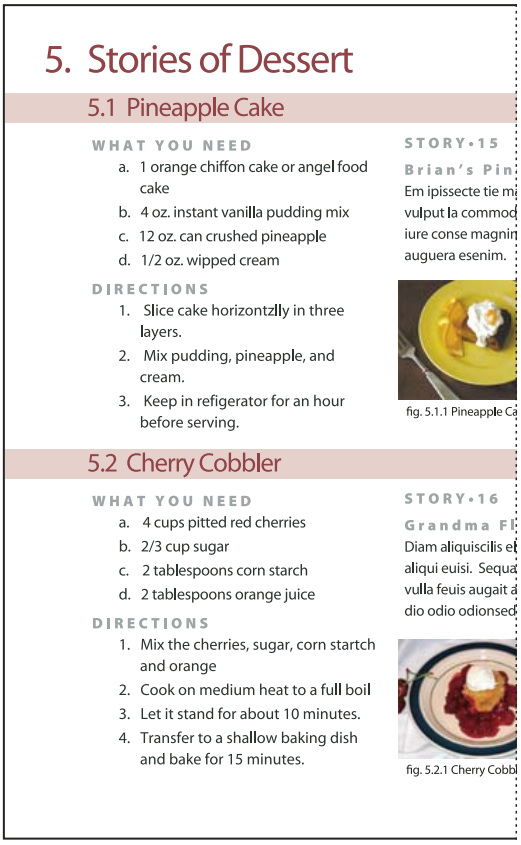
Defining lists

A defined list can be interrupted by other paragraphs and lists, and can span different stories and different documents in a book. For example, use defined lists to create a multi-level outline, or to create a running list of numbered table names throughout your document. You can also define lists for separately numbered or bulleted items that are mixed together. For example, in a list of questions and answers, define one list for numbering the questions and another for numbering the answers.

Defined lists are often used to track paragraphs for numbering purposes. When you create a paragraph style for numbering, you can assign the style to a defined list, and paragraphs are numbered in that style according to where they appear in the defined list. The first paragraph to appear is given number 1 (“Table 1”), for example, and the next paragraph is given number 2 (“Table 2”), even if it appears several pages later. Because both paragraphs belong to the same defined list, they can be numbered consecutively no matter how far apart they are in the document or book.

Define a new list for each type of item you want to number—step-by-step instructions, tables, and figures, for example. By defining multiple lists, you can interrupt one list with another and maintain number sequences in each list.

List items are numbered in the order in which they are added to the page. To reorder the items, cut and paste the items one by one in the order in which you want them to be listed.



Defined lists let you interrupt one list with another.

For a video tutorial on creating bulleted and numbered lists, see www.adobe.com/go/vid0077.

Define a list

1 Choose Type > Bulleted And Numbered Lists > Define Lists.

2 Click New in the Define Lists dialog box.

3 Enter a name for the list, choose whether you want to continue numbering across stories, and continue numbering from previous documents in your book.

4 Click OK twice.

After you define a list, you can use it in a paragraph style, such as a style for tables, figures, or ordered lists, as well as apply it by way of the Control panel and Paragraph panel.

Note: *Some lists are defined automatically. For example, when you import a numbered list from a Microsoft Word document, InDesign defines a list automatically for your document.*

Edit a defined list

1 Choose Type > Bulleted And Numbered Lists > Define Lists.

2 Select a list and click Edit.

3 Enter a new name for the list or change your selection of Continue Numbers options.

Paragraph styles that are assigned to the list are reassigned to the list under its new name.

Delete a defined list

1 Choose Type > Bulleted And Numbered Lists > Define Lists.

2 Select a list.

3 Click Delete, and then select a different list or the [Default] list to replace your list with.

Create a paragraph style for running lists

To create a *running list*—a list that is interrupted by other paragraphs or that spans multiple stories or documents—create a paragraph style and apply the style to paragraphs that you want to be part of the list. For example, to create a running list of the tables in your document, create a paragraph style called Tables, make a defined list part of the style, and then apply the Tables paragraph style to all paragraphs you want in your Table list.

1 Choose New Paragraph Style from the Paragraph Styles panel menu.

2 Enter a style name.

3 On the left side of the New Paragraph Style dialog box, click Bullets And Numbering.

4 For List Type, select Bullets or Numbering.

5 If you are creating a style for numbered lists, choose a defined list from the List menu, or choose New List and define the list.

6 Specify the bullet or numbering characteristics.

7 Use the Bullet or Number Position section of the New Paragraph Style dialog box to change the indent spacing. For example, to create a hanging indent, type **2p** for Left Indent and **-2p** for First Line Indent.

8 Specify other paragraph style attributes for the style, and then click OK.

See also

"Add paragraph and character styles" on page 167

Create multi-level lists

A *multi-level list* is a list that describes hierarchical relationships between the list paragraphs. These lists are also called *outline lists* because they resemble outlines. The list's numbering scheme (as well as indentations) show rank as well as how items are subordinate to one another. You can tell where each paragraph fits in the list with respect to the paragraphs before and after it. You can include up to nine levels in a multi-level list.

4. History of Dessert
4.1. European
4.2. American
4.3. Ethnic
5. Stories of Dessert
5.1. Pineapple Cake
A. What You Need
B. Directions
C. Story: Brian's
a. Figure 1
b. FIgure 2
5.2. Cherry Cobbler
A. What You Need
B. Directions
C. Story: Grandma Flora's
a. Figure 1
b. FIgure 2
6. Index of Must Taste

Outline Level 1
Outline Level 2
Outline Level 2
Outline Level 2
Outline Level 1
Outline Level 2
Outline Level 3
Outline Level 3
Outline Level 3
Outline Level 4
Outline Level 4
Outline Level 2
Outline Level 3
Outline Level 3
Outline Level 3
Outline Level 4
Outline Level 4
Outline Level 1

Multi-level list with numbers and letters marking hierarchy levels

To create a multi-level list, define the list and then create a paragraph style for each level you want. For example, a list with four levels requires four paragraph styles (each one assigned the same defined list). As you create each style, you define its numbering format and paragraph formatting.

For a video tutorial on creating outlines and multi-level lists, see this video from Instant InDesign: www.instantindesign.com/index.php?view=391. For step-by-step tutorials on creating outlines or multi-level lists (such as 1.1, 1.2, 1.2.1, and so on), see this site: http://blogs.adobe.com/indesigndocs/2009/04/numbered_lists_part_i_outlines.html.

1 Choose New Paragraph Style from the Paragraph Styles panel menu.

2 Enter a style name.

3 If you already created a style for your multi-level list, choose the style you will assign to levels above this one from the Based On menu; otherwise, choose No Paragraph Style or Basic Paragraph.

4 On the left side of the New Paragraph Style dialog box, click Bullets And Numbering.

5 Choose Numbers from the List Type menu.

6 Choose a list you defined from the List menu. If you haven't yet defined your list, you can choose New List from the menu and define it now.

7 In the Level box, enter a number that describes which level of the multi-level list you're creating a style for.

8 From the Format menu, choose the type of numbering you want to use.

9 In the Number box, enter metacharacters or select metacharacters from the menus to describe the number formatting you want for list items at this level.

- To include numbering prefixes from higher levels, enter text or click at the start of the Number box and choose Insert Number Placeholder and then select a Level option (for example, Level 1), or enter ^ and then the list level (for example, enter **^1**). In a list with first levels numbered 1, 2, 3, and so on, and second levels numbered a, b, c, and so on, including the first-level prefix in the second level renders second-level numbers as 1a, 1b, 1c; 2a, 2b, 2c; 3a, 3b, 3c.
- To create a number expression, enter punctuation, enter metacharacters, or select options on the Insert Special Character list.

10 Select Restart Numbers At This Level After to renumber beginning at 1 when a paragraph at this level appears after a paragraph at a higher level; deselect this option to number paragraphs at this level consecutively throughout the list without regard for where the paragraphs appear in the list hierarchy.

To restart numbers after a specific level or range of levels, type the level number or range (such as **2**-**4**) in the Restart Numbers At This Level After field.

11 In the Bullet or Number Position area, choose Indent or Tab Position options to indent list items at this level farther than list items at higher levels. Indenting helps subordinate items in lists stand out.

12 Click OK.

In some cases, such as with numbered steps, you may want to restart numbering within the same story. To avoid restarting the numbered list manually, create a separate style that's identical to the Level 1 style with one exception. For Mode, chose Start At, and then specify 1. Name this style something like "Level 1 Restart."

Create running captions for figures and tables

Running captions number figures, tables, and other items consecutively in a document. For example, the first figure caption starts with the words "Figure 1," the second with "Figure 2," and so on. To make sure that figures, tables, or similar items are numbered consecutively, define a list for the item, and then create a paragraph style that includes the list definition. You can also add descriptive words such as "Figure" or "Table" to the numbering scheme of the paragraph style.

List items are numbered in the order in which they are added to the page. To reorder the items, cut and paste the items one by one in the order in which you want them to be listed.

1 Create a new paragraph style and, in the Bullets And Numbering section of the Paragraph Style Options dialog box, choose Numbers from the List Type menu.

2 Choose a defined list from the List menu (or choose New List to define a list).

3 Under Numbering Style, select the type of numbering you want to use from the Format menu.

For example, select the A, B, C, D... option to create a list for "Figure A," "Figure B," and so on.

4 In the Number box, enter a descriptive word and any spacing or punctuation (as needed) along with the numbering metacharacters.

For example, to create a "Figure A" effect, enter the word "Figure" and a space before the numbering metacharacters (such as **Figure ^#.^t**). This adds the word "Figure" followed by a sequential number (^#), a period, and a tab (^t).

Note: *To include chapter numbers in running captions, choose Insert Number Placeholder > Chapter Number from the Number list, or enter* ***^H*** *where you want the chapter number to appear in the number scheme.*

5 Finish creating the style and click OK.

After you create the style, apply it to text figure captions or table titles.

You can use the Table Of Contents feature to generate a list of tables or figures.

Restart or continue numbering for a list

InDesign offers commands for restarting a list and continuing a list:

Restarting a numbered list Place the insertion point in the paragraph and choose Restart Numbering from the context menu or choose Type > Bulleted And Numbered Lists > Restart Numbering. In normal lists, this command assigns the

number 1 (or letter A) to a paragraph and makes it the first paragraph in a list. In multi-level lists, this command assigns the first lower-level number to a nested paragraph.

Continuing a numbered list Choose Continue Numbering from the context menu or choose Type > Bulleted And Numbered Lists > Continue Numbering. This command resumes numbering a list that was interrupted by commentary, graphics, or nested list items. InDesign also offers commands for numbering lists that begin in one story or book and cross into the next story or book.

Number a list from the previous or current story

Whether a list resumes numbering from the previous story or starts numbering anew in the current story depends on how the list is defined.

1 Choose Type > Bulleted And Numbered Lists > Define Lists.

2 Select a list and click the Edit button.

Don't choose the Default list because it can't run across stories.

3 Select Continue Numbers Across Stories to resume numbering the list from the previous story, or deselect this option to start the list in the current story at 1 (or A).

4 Click OK twice.

Number a list from the previous or current document in a book

Whether a list resumes numbering from the previous document in a book or starts numbering anew in the current document depends on how the list is defined.

1 Choose Type > Bulleted And Numbered Lists > Define Lists.

2 Select a list and click the Edit button.

3 Select Continue Numbers From Previous Document In Book to resume numbering the list from the previous document (you must choose Continue Numbers Across Stories to activate this option), or deselect this option to start the list in the current document at 1 (or A).

4 Click OK twice.

Convert list bullets or numbers to text

1 Select the paragraphs containing the bulleted or numbered list.

2 Do one of the following:

- From the Paragraph panel menu, choose Convert Numbering To Text or Convert Bullets To Text.
- Right-click (Windows) or Command-click (Mac OS) the selection, and then choose Convert Numbering To Text or Convert Bullets To Text.

Note: *To remove the list numbers or bullets, click the Numbered List button or Bulleted List button to unapply list formatting to the selected text.*

See also

"Convert style bullets and numbering to text" on page 173

Text composition

Compose text

The appearance of text on your page depends on a complex interaction of processes called *composition*. Using the word spacing, letterspacing, glyph scaling, and hyphenation options you've selected, InCopy composes your type in a way that best supports the specified parameters.

InCopy offers two composition methods: Adobe Paragraph Composer (the default) and Adobe Single-line Composer (both are available from the Control panel menu). You can select which composer to use from the Paragraph panel menu, the Justification dialog box, or the Control panel menu.

For a video tutorial on working with text, see www.adobe.com/go/vid0075.

See also

Working with Text video

"Change Justification settings" on page 223

Composition methods

InCopy offers two composition methods: Adobe Paragraph Composer (the default) and Adobe Single-line Composer. Both composition methods evaluate possible breaks, and choose those that best support the hyphenation and justification options you've specified for a given paragraph.

The Adobe Paragraph Composer

Considers a network of breakpoints for an entire paragraph, and thus can optimize earlier lines in the paragraph in order to eliminate especially unattractive breaks later on. Paragraph composition results in more even spacing with fewer hyphens.

The Paragraph Composer approaches composition by identifying possible breakpoints, evaluating them, and assigning a weighted penalty to them based on such principles as evenness of letterspacing, word spacing, and hyphenation.

You can use the Hyphenation dialog box to determine the relationship between better spacing and fewer hyphens. (See "Hyphenate text" on page 222.)

The Adobe Single-line Composer

Offers a traditional approach to composing text one line at a time. This option is useful if you want to restrict composition changes from late-stage edits.

Choose a composition method for a paragraph

❖ Do any of the following:

- From the Paragraph panel menu, choose Adobe Paragraph Composer (the default) or Adobe Single-line Composer.
- From the Paragraph panel menu or the Control panel menu, choose Justification, and then choose an option from the Composer menu.

Note: *Additional composition engine plug-ins from other companies may be available, along with interfaces that let you customize an engine's parameters.*

Set composition preferences

1 Choose Edit > Preferences > Composition (Windows) or InCopy > Preferences > Composition (Mac OS).

2 To use on-screen highlighting to identify compositional problems, select Keep Violations And H&J Violations (hyphenation and justification).

3 To justify text that wraps around an object, select Justify Text Next To An Object.

4 Click OK.

Hyphenate text

The settings you choose for hyphenation and justification affect the horizontal spacing of lines and the aesthetic appeal of type on your pages. Hyphenation options determine whether words can be hyphenated and, if they can, which breaks are allowable.

Justification is controlled by the alignment option you choose, the word spacing and letterspacing you specify, and whether or not you have used glyph scaling. You can also justify single words in narrow columns of fully justified text.

See also

"Adjust word and letterspacing in justified text" on page 224

"Hyphenation and spelling dictionaries" on page 159

Adjust hyphenation manually

You can hyphenate words manually or automatically, or you can use a combination of the two methods. The safest way to hyphenate manually is to insert a *discretionary hyphen*, which is not visible unless the word needs to be broken at the end of a line. Placing a discretionary hyphen at the beginning of a word prevents it from being broken.

1 Using the Type tool T, click where you want to insert the hyphen.

2 Do one of the following:

- Choose Type > Insert Special Character > Hyphens And Dashes > Discretionary Hyphen.
- Press Ctrl+Shift+- (Windows) or Command+Shift+- (Mac OS) to insert a discretionary hyphen.

Note: *Entering a discretionary hyphen in a word does not guarantee that the word will be hyphenated. Whether or not the word breaks depends on other hyphenation and composition settings. However, entering a discretionary hyphen in a word does guarantee that the word can be broken only where the discretionary hyphen appears.*

Adjust hyphenation automatically

Hyphenation is based on word lists that can be stored either in a separate user dictionary file on your computer, or in the document itself. To ensure consistent hyphenation, you may want to specify which word list to refer to, especially if you will be taking your document to a service provider or if you work in a workgroup.

❖ To turn automatic hyphenation on or off for a paragraph, in the Paragraph panel or Control panel, select or deselect the Hyphenation option. (You can also include this option in a paragraph style.)

When you set automatic hyphenation options, you can determine the relationship between better spacing and fewer hyphens. You can also prevent capitalized words and the last word in a paragraph from being hyphenated.

Set automatic hyphenation options for a paragraph

1 Click in a paragraph or select the range of paragraphs you want to affect.

2 Choose Hyphenation from the Paragraph panel menu.

3 Select the Hyphenate option.

4 Make changes to the following settings as needed, and then click OK:

Words With At Least _ Letters Specify the minimum number of characters for hyphenated words.

After First _ Letters / Before Last _ Letters Specify the minimum number of characters at the beginning or end of a word that can be broken by a hyphen. For example, by specifying 3 for these values, *aromatic* would be hyphenated as *aro- matic* instead of *ar- omatic* or *aromat- ic*.

Hyphen Limit Specify the maximum number of hyphens that can appear on consecutive lines. Zero means unlimited hyphens.

Hyphenation Zone Specify the amount of white space allowed at the end of a line of unjustified text before hyphenation begins. This option applies only when you're using the Single-line Composer with nonjustified text.

Better Spacing / Fewer Hyphens To alter the balance between these settings, adjust the slider at the bottom of the dialog box.

Hyphenate Capitalized Words To prevent capitalized words from being hyphenated, deselect this option.

Hyphenate Last Word To prevent last words in paragraphs from being hyphenated, deselect this option.

Hyphenate Across Column To prevent words from being hyphenated across a column, frame, or page, deselect this option.

Prevent unwanted word breaks

By using nonbreaking hyphens, you can prevent certain words from breaking at all—for example, proper names or words which, when broken, become unattractive fragments. By using nonbreaking spaces, you can also keep multiple words from breaking—for example, clusters of initials and a last name (P. T. Barnum).

Prevent text from breaking

1 Select the text you want to keep on the same line.

2 Choose No Break from the Character panel menu or the Control panel menu.

Another way to prevent a word from breaking is to place a discretionary hyphen at the beginning of the word. Press Ctrl+Shift+- (Windows) or Command+Shift+- (Mac OS) to insert a discretionary hyphen.

Create a nonbreaking hyphen

1 Using the Type tool T, click where you want to insert the hyphen.

2 Choose Type > Insert Special Character > Hyphens And Dashes > Nonbreaking Hyphen.

Create a nonbreaking space

1 Using the Type tool T, click where you want to insert the space.

2 Choose Type > Insert White Space> Nonbreaking Space (or any other white space character).

The Nonbreaking Space varies in width depending on point size, the justification setting, and word space settings, whereas the Nonbreaking Space (Fixed Width) character maintains the same width regardless of context.

Change Justification settings

Use the Justification panel to precisely control how word spacing, letterspacing, and glyph scaling. Adjusting spacing is especially useful with justified type, although you can also adjust spacing for unjustified type.

Adjust word and letterspacing in justified text

1 Insert the cursor in the paragraph you want to change, or select a type object or frame to change all of its paragraphs.

2 Choose Justification from the Paragraph panel menu.

3 Enter values for Word Spacing, Letter Spacing, and Glyph Spacing. The Minimum and Maximum values define a range of acceptable spacing for justified paragraphs only. The Desired value defines the desired spacing for both justified and unjustified paragraphs:

Word Spacing The space between words that results from pressing the spacebar. Word Spacing values can range from 0% to 1000%; at 100%, no additional space is added between words.

Letter Spacing The distance between letters, including kerning or tracking values. Letter Spacing values can range from -100% to 500%: at 0%, no space is added between letters; at 100%, an entire space width is added between letters.

Glyph Scaling The width of characters (a *glyph* is any font character). Glyph Scaling values can range from 50% to 200%.

Spacing options are always applied to an entire paragraph. To adjust the spacing in a few characters, but not an entire paragraph, use the Tracking option.

4 Set the Single Word Justification option to specify how you want to justify single-word paragraphs.

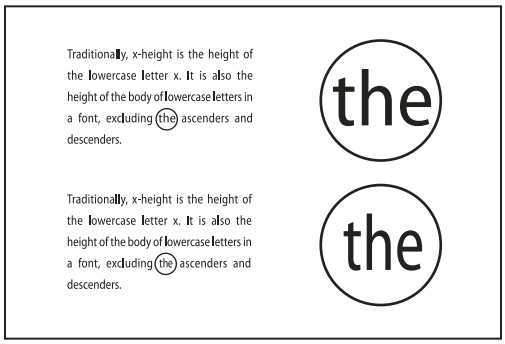
In narrow columns, a single word can occasionally appear by itself on a line. If the paragraph is set to full justification, a single word on a line may appear to be too stretched out. Instead of leaving such words fully justified, you can center them or align them to the left or right margins.

Set glyph scaling in justified text

1 Click an insertion point in a paragraph or select the paragraphs you want to affect.

2 Choose Justification from the Paragraph panel menu.

3 Type values for Glyph Scaling Minimum, Desired, and Maximum. Then click OK.

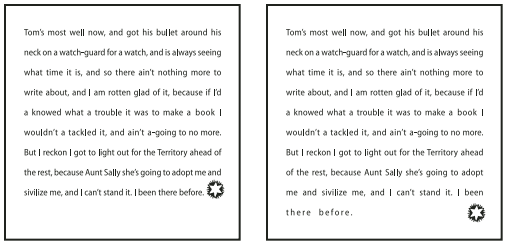


Before (top) and after (bottom) glyph scaling in justified text

Glyph scaling can help in achieving even justification; however, values more than 3% from the 100% default value may result in distorted letter shapes. Unless you're striving for a special effect, it's best to keep glyph scaling to subtle values, such as 97–100–103.

Use a flush space with justified text

Using a flush space character adds a variable amount of space to the last line of a fully justified paragraph—between the last word and an end-of-story character from a decorative font. Used with nonjustified text, the flush space appears as a normal word space. In justified text, it expands to absorb all available extra space on the last line. Using a flush space can make a dramatic difference in the way the entire paragraph is formatted by the Adobe Paragraph Composer.



Before and after adding a flush space character

1 Using the Type tool T , click directly in front of the end-of-story character.

2 Choose Type > Insert White Space > Flush Space.

Note: *The effect of a flush space isn't apparent until you apply the Justify All Lines option to the paragraph.*

Highlight lines that are too loose or tight

Because composing a line of type involves factors in addition to word spacing and letterspacing (hyphenation preferences, for example), InDesign cannot always honor your settings for word spacing and letterspacing. However, compositional problems in lines of text can be highlighted in yellow; the darkest of three shades indicates the most serious problems.

1 Choose Edit > Preferences > Composition (Windows) or InCopy > Preferences > Composition (Mac OS).

2 Select H&J Violations and click OK.

Chapter 8: Tables

A table consists of rows and columns of cells. A cell is like a text frame in which you can add text, anchored frames, or other tables. Create tables in Adobe InDesign CS4 or export them from other applications.

Note: *To create, edit, and format tables in Adobe InCopy, make sure you are in Layout view.*

Creating tables

Create tables

A table consists of rows and columns of cells. A cell is like a text frame in which you can add text, inline graphics, or other tables. You can create tables from scratch or by converting them from existing text. You can also embed a table within a table.

When you create a table, the new table fills the width of the container text frame. A table is inserted on the same line when the insertion point is at the beginning of the line, or on the next line, when the insertion point is in the middle of a line.

Tables flow with surrounding text just as inline graphics do. For example, a table moves through threaded frames when the text above it changes in point size or when text is added or deleted. However, a table cannot appear on a text-on-path frame.

For a video tutorial on creating and formatting tables, see www.adobe.com/go/vid0081.

See also

"Formatting tables" on page 235

Creating and Formatting Tables video

Create a table from scratch

The table you create fills the width of the text frame.

1 Using the Type tool T , place the insertion point where you want the table to appear.

2 Choose Table > Insert Table.

3 Specify the numbers of rows and columns.

4 If your table contents will continue on more than one column or frame, specify the number of header or footer rows in which you want the information to be repeated.

5 (Optional) Specify a table style.

6 Click OK.

The row height of a table is determined by the specified table style. For example, a table style may use cell styles to format different parts of the table. If any of these cell styles include paragraph styles, the leading value of the paragraph styles determines the row height of that area. If no paragraph style is used, the document's default slug determines the row height. (The slug is based on the leading value. In this context, a *slug* is the approximate height of the highlighting in selected text.)

Create a table from existing text

Before you convert text to a table, make sure that you set up the text properly.

1 To prepare the text for conversion, insert tabs, commas, paragraph returns, or another character to separate columns. Insert tabs, commas, paragraph returns, or another character to separate rows. (In many instances, text can be converted to a table without having to be edited.)

2 Using the Type tool T , select the text you want to convert to a table.

3 Choose Table > Convert Text To Table.

4 For both Column Separator and Row Separator, indicate where new rows and columns should begin. Choose Tab, Comma, or Paragraph, or type the character, such as a semicolon (;), in the Column Separator and Row Separator field. (Any character you type appears in the menu the next time you create a table from text.)

5 If you specify the same separator for columns and rows, indicate the number of columns you want the table to include.

6 (Optional) Specify a table style to format the table.

7 Click OK.

If any row has fewer items than the number of columns in a table, empty cells fill out the row.

Embed a table within a table

1 Do one of the following:

- Select the cells or table you want to embed, and then choose Edit > Cut or Copy. Place the insertion point in the cell where you want the table to appear, and then choose Edit > Paste.
- Click inside the table, choose Table > Insert Table, specify the number of rows and columns, and then click OK.

2 Adjust the cell inset as necessary. (See "Format text within a table" on page 237.)

If you create a table within a cell, you cannot use the mouse to select any part of the table that oversets the cell boundary. Instead, expand the row or column; or place the insertion point in the first part of the table, and use keyboard shortcuts to move the insertion point and select text.

Importing tables from other applications

When you use the Place command to import a Microsoft Word document that includes tables, or a Microsoft Excel spreadsheet, imported data is an editable table. You can use the Import Options dialog box to control the formatting.

You can also paste data from an Excel spreadsheet or a Word table into an InDesign or InCopy document. The Clipboard Handling preference settings determine how text pasted from another application is formatted. If Text Only is selected, the information appears as unformatted tabbed text, which you can then convert to a table. If All Information is selected, the pasted text appears in a formatted table.

If you're pasting text from another application into an existing table, insert enough rows and columns to accommodate the pasted text, select the Text Only option in Clipboard Handling preferences, and make sure that at least one cell is selected (unless you want to embed the pasted table into a cell).

If you want more control over formatting the imported table, or if you want to maintain a link to the spreadsheet formatting, use the Place command to import the table.

You can also copy and paste tabbed text across a selection of table cells. This technique is a great way to replace content while preserving formatting. For example, suppose you want to update the content of a formatting table in a monthly magazine. One possibility is to link to an Excel spreadsheet. However, if your content comes from a different source, you can copy the tabbed text containing the new content, select the range of cells in the formatted InDesign table, and paste.

See also

"Place (import) text" on page 91

Add text to a table

You can add text, anchored objects, XML tags, and other tables to table cells. The height of a table row expands to accommodate additional lines of text, unless you set a fixed row height. You cannot add footnotes to tables.

❖ Using the Type tool T , do any of the following:

- Position the insertion point in a cell, and type text. Press Enter or Return to create a new paragraph in the same cell. Press Tab to move forward through cells (pressing Tab in the last cell inserts a new row). Press Shift+Tab to move backwards through cells.
- Copy text, position the insertion point in the table, and then choose Edit > Paste.
- Position the insertion point where you want to add text, choose File > Place, and then double-click a text file.

See also

"Resize columns, rows, and tables" on page 236

"Work with overset cells" on page 239

Add graphics to a table

To add a graphic to a table in a standalone InCopy document, make sure that you're in Layout view. To add a graphic to a table in a linked InDesign document, use InDesign so that you have more control over resizing the text frame.

For a video tutorial on placing images into a table, see www.adobe.com/go/vid0083.

❖ Do any of the following:

- Position the insertion point where you want the graphic, choose File > Place, and then double-click the graphic's filename.
- Copy a graphic or a frame, position the insertion point, and then choose Edit > Paste.

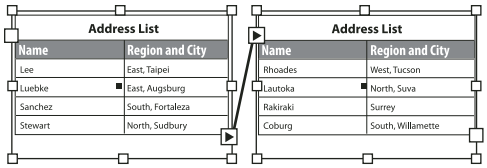
When you add a graphic that is larger than the cell, the cell height expands to accommodate the graphic, but the width of the cell doesn't change—the graphic may extend beyond the right side of the cell. If the row in which the graphic is placed is set to a fixed height, a graphic that is taller than the row height causes the cell to be *overset*.

To avoid an overset cell, you may want to place the image outside the table, resize the image, and then paste it into the table cell.

Add table headers and footers

When you create a long table, the table may span more than one column, frame, or page. You can use headers or footers to repeat the information at the top or bottom of each divided portion of the table.

You can add header and footer rows when you create the table. You can also use the Table Options dialog box to add header and footer rows and change how they appear in the table. You can convert body rows to header or footer rows.



Header rows repeated once per frame

To number tables sequentially, such as Table 1A, Table 1B, and so on, add a variable to the table header or footer. (See "Create running captions for figures and tables" on page 219.)

For a video tutorial on creating table headers and footers, see www.adobe.com/go/vid0082.

See also

"Break tables across frames" on page 237

"Create variables for running headers and footers" on page 128

Convert existing rows to header or footer rows

1 Select the rows at the top of the table to create header rows, or at the bottom of the table to create footer rows.

2 Choose Table > Convert Rows > To Header or To Footer.

Change header or footer row options

1 Place the insertion point in the table, and then choose Table > Table Options > Headers And Footers.

2 Specify the number of header or footer rows. Blank rows may be added to the top or bottom of the table.

3 Specify whether the information in the header or footer appears in every text column (if text frames have more than one column), once per frame, or only once per page.

4 Select Skip First if you don't want the header information to appear in the first row of the table. Select Skip Last if you don't want the footer information to appear in the last row of the table.

The Skip First option is especially useful if you want to indicate that the header or footer is continued. For example, for a table that spans multiple pages, you may want the header text to be "Table 2 (Continued)." Since you don't want "(Continued)" to appear at the beginning of the table, select Skip First, and simply type **Table 2** in the first row of the table.

5 Click OK.

Remove header or footer rows

❖ Do any of the following:

- Place the insertion point in the header or footer row, and then choose Table > Convert Rows > To Body.
- Choose Table > Table Options > Headers And Footers, and then specify a different number of header rows or footer rows.

Selecting and editing tables

Select table cells, rows, and columns

When you select part or all of the text in a cell, that selection has the same appearance as would text selected outside a table. However, if the selection spans more than one cell, the cells and their contents are both selected.

If a table spans more than one frame, holding the mouse pointer over any header or footer row that is not the first header or footer row causes a lock icon to appear, indicating that you cannot select text or cells in that row. To select cells in a header or footer row, go to the beginning of the table.

See also

"Keys for tables" on page 281

Select cells

❖ Using the Type tool T , do any of the following:

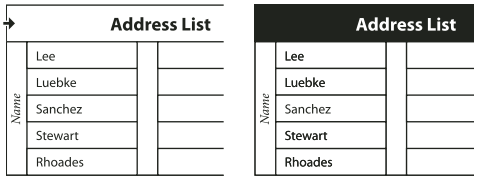
- To select a single cell, click inside a table, or select text, and then choose Table > Select > Cell.
- To select multiple cells, drag across a cell border. Be careful not to drag the column or row line so that you don't resize the table.

To switch between selecting all of the text in a cell and selecting the cell, press Esc.

Select entire columns or rows

❖ Using the Type tool T , do any of the following:

- Click inside a table, or select text, and then choose Table > Select > Column or Row.
- Move the pointer over the top edge of a column or the left edge of a row so that the pointer becomes an arrow shape (✚ or ➡), and then click to select the entire column or row.



Before and after selecting Row

Select all header, body, or footer rows

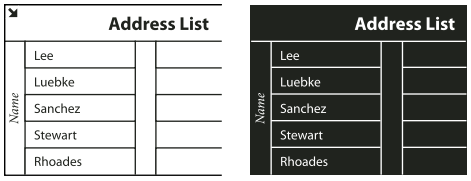
1 Click inside a table, or select text.

2 Choose Table > Select > Header Rows, Body Rows, or Footer Rows.

Select the entire table

❖ Using the Type tool T , do any of the following:

- Click inside a table, or select text, and then choose Table > Select > Table.
- Move the pointer over the upper left corner of the table so that the pointer becomes an arrow shape ↘ , and then click to select the entire table.



Before and after selecting table

- Drag the Type tool across the entire table.

You can also select a table in the same way you select an anchored graphic—place the insertion point immediately before or after a table, and then hold down Shift while pressing the Right Arrow key or Left Arrow key, respectively, to select the table.

Insert rows and columns

You can insert rows and columns using a number of different methods.

Insert a row

1 Place the insertion point in a row below or above where you want the new row to appear.

2 Choose Table > Insert > Row.

3 Specify the number of rows you want.

4 Specify whether the new row or rows should appear before or after the current row, and then click OK.

The new cells have the same formatting as the text in the row in which the insertion point was placed.

You can also create a new row by pressing Tab when the insertion point is in the last cell.

Insert a column

1 Place the insertion point in a column next to where you want the new column to appear.

2 Choose Table > Insert > Column.

3 Specify the number of columns you want.

4 Specify whether the new column or columns should appear before or after the current column, and then click OK.

The new cells have the same formatting as the text in the column in which the insertion point was placed.

Insert multiple rows and columns

1 With the insertion point in the table, choose Table > Table Options > Table Setup.

2 Specify a different number of rows and columns, and then click OK.

New rows are added to the bottom of the table; new columns are added to the right side of the table.

You can also change the number of rows and columns using the Table panel. To display the Table panel, choose Window > Type & Tables > Table.

Insert a row or column by dragging

When adding columns, if you drag more than one and one-half times the width of the column being dragged, new columns are added that have the same width as the original column. If you drag to insert only one column, that column can have a narrower or wider width than the column from where you dragged. The same behavior is true of rows, unless the Row Height for the row being dragged is set to At Least. In this case, if you drag to create only one row, InDesign will resize the new row, if necessary, so that it's tall enough to contain text.

1 Position the Type tool T over the border of a column or row so that a double-arrow icon (↔ or ↕) appears.

2 Hold down the mouse button, and then hold down Alt (Windows) or Option (Mac OS) while dragging down to create a new row, or to the right to create a new column. (If you press Alt or Option before holding down the mouse button, the Hand tool appears—so make sure you begin dragging before you press Alt or Option.)

Note: *Dragging to insert rows or columns doesn't work at the top or left edges of a table. These fields are used to select rows or columns.*

Delete rows, columns, or tables

- To delete a row, column, or table, place the insertion point inside the table, or select text in the table, and then choose Table > Delete > Row, Column, or Table.
- To delete rows and columns by using the Table Options dialog box, choose Table > Table Options > Table Setup. Specify a different number of rows and columns, and then click OK. Rows are deleted from the bottom of the table; columns are deleted from the right side of the table.
- To delete a row or column by using the mouse, position the pointer over the border of the bottom or right side of the table so that a double-arrow icon (↔ or ↕) appears; hold down the mouse button; and then hold down Alt (Windows) or Option (Mac OS) while dragging either up to delete rows, or to the left to delete columns.

Note: *If you press Alt or Option before holding down the mouse button, the Hand tool will appear—so press Alt or Option after you begin dragging.*

- To delete cell contents without deleting cells, select the cells containing the text you want to delete, or use the Type tool T to select the text within the cells. Press Backspace or Delete, or choose Edit > Clear.

Change the alignment of a table within a frame

A table assumes the width of the paragraph or table cell in which it is created. However, you can change the size of the text frame or table so that the table is wider or narrower than the frame. In such a case, you can decide where you want the table to be aligned within the frame.

1 Place the insertion point to the right or left of the table. Make sure that the text insertion point is placed on the table paragraph and not inside the table. The insertion point becomes as tall as the table in the frame.

2 Click an alignment button (such as Align Center) in the Paragraph panel or Control panel.

See also

"Resize columns, rows, and tables" on page 236

Navigate within a table

Use the Tab or arrow keys to move within a table. You can also jump to a specific row, especially useful in long tables.

See also

"Keys for tables" on page 281

Move within a table using Tab

- Press Tab to move to the next cell. If you press Tab in the last table cell, a new row is created. For information on inserting tabs and indents in a table, see "Format text within a table" on page 237.
- Press Shift+Tab to move to the previous cell. If you press Shift+Tab in the first table cell, the insertion point moves to the last table cell.

Move within a table using arrow keys

- Press the arrow keys to navigate within and between table cells. If you press the Right Arrow key when the insertion point is at the end of the last cell in a row, the insertion point moves to the beginning of the first cell in the same row. Similarly, if you press the Down Arrow key when the insertion point is at the end of the last cell in a column, the insertion point moves to the beginning of the first cell in the same column.

Jump to a specific row in a table

1 Choose Table > Go To Row.

2 Do any of the following:

- Specify the row number you want to jump to, and then click OK.
- If a header or footer row is defined in the current table, choose Header or Footer from the menu, and then click OK.

Cut, copy, and paste table contents

When text is selected within a cell, cutting, copying, and pasting actions are the same as for text selected outside a table. You can also cut, copy, and paste cells and their contents. If the insertion point is in a table when you paste, multiple pasted cells appear as a table within a table. You can also move or copy the entire table.

1 Select the cells you want to cut or copy, and then choose Edit > Cut or Copy.

2 Do any of the following:

- To embed a table within a table, place the insertion point in the cell where you want the table to appear, and then choose Edit > Paste.
- To replace existing cells, select one or more cells in the table—making sure that there are sufficient cells below and to the right of the selected cell—and then choose Edit > Paste.

See also

"Select table cells, rows, and columns" on page 230

Move or copy a table

1 To select the entire table, place the insertion point in the table and choose Table > Select > Table.

2 Choose Edit > Cut or Copy, move the insertion point where you want the table to appear, and then choose Edit > Paste.

Convert tables to text

1 Using the Type tool T, place the insertion point inside the table, or select text in the table.

2 Choose Table > Convert Table To Text.

3 For both Column Separator and Row Separator, specify the separators you want to use.

For best results, use a different separator for columns and rows, such as tabs for columns and paragraphs for rows.

4 Click OK.

When you convert a table to text, the table lines are removed and the separator you specify is inserted at the end of each row and column.

Combine tables

Use the Paste command to merge two or more tables into a single table.

1 In the target table, insert at least as many blank rows as you'll be pasting from the other tables. (If you insert fewer rows than are copied, you cannot paste.)

2 In the source table, select the cells you want to copy. (If you copy more column cells than are available in the target table, you cannot paste.)

3 Select at least one cell where you want the incoming rows to be inserted, and then choose Edit > Paste.

If the pasted rows use different formatting than the rest of the table, define one or more cell styles, and then apply the cell styles to the pasted cells. Hold down Alt (Windows) or Option (Mac OS) while clicking the cell style to override existing formatting.

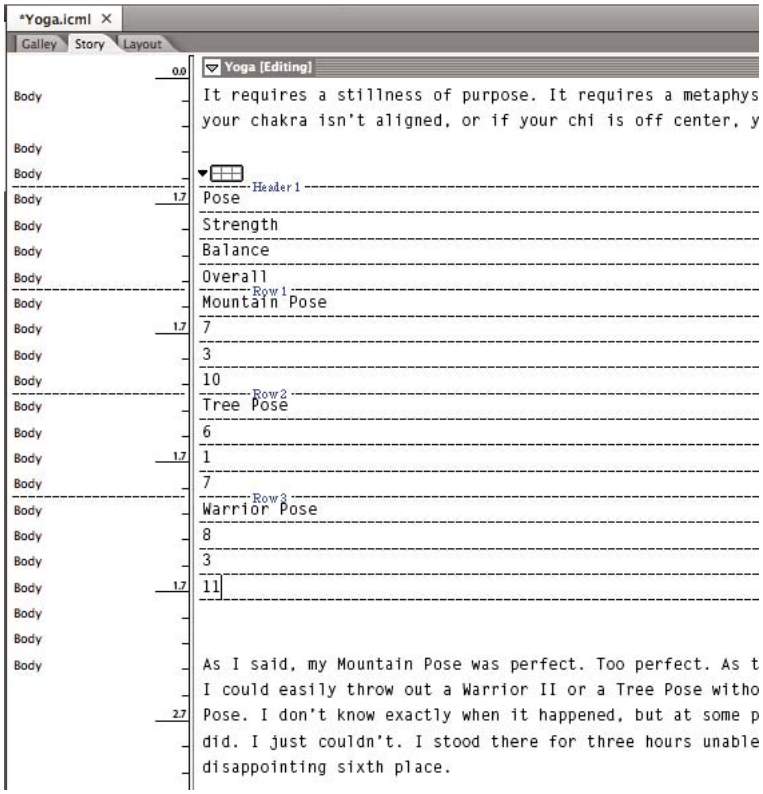
See also

"Cut, copy, and paste table contents" on page 233

"Table and cell styles" on page 243

Working with tables in Galley/Story view

When you're working in Galley or Story view, you can edit tables and their contents.



Editing tables in Story view

- To expand or collapse the table in Galley or Story view, click the triangle to the left of the table icon at the top of the table.
- To determine whether the table is sorted by rows or columns, right-click (Windows) or Ctrl-click (Mac OS) the table icon and choose Arrange By Rows or Arrange By Columns.
- Use Layout view to modify and format the table. You cannot select columns or rows in Story Editor.

Formatting tables

Formatting tables

Use the Control panel or Character panel to format text within a table—just like formatting text outside a table. In addition, two main dialog boxes help you format the table itself: Table Options and Cell Options. Use these dialog boxes to change the number of rows and columns, to change the appearance of the table border and fill, to determine the spacing above and below the table, to edit header and footer rows, and to add other table formatting.

Use the Table panel, the Control panel, or the context menu to format the table structure. Select one or more cells and then right-click (Windows) or Control-click (Mac OS) to display a context menu with table options.

For a video tutorial on creating and formatting tables, see www.adobe.com/go/vid0081.

See also

"Table strokes and fills" on page 239

Creating and Formatting Tables video

Resize columns, rows, and tables

You can resize columns, rows, and tables using a number of different methods.

See also

"Change the alignment of a table within a frame" on page 232

Resize columns and rows

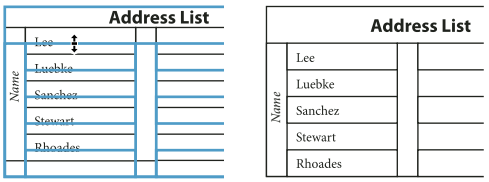
1 Select cells in the columns and rows you want to resize.

2 Do one of the following:

- In the Table panel, specify Column Width and Row Height settings.
- Choose Table > Cell Options > Rows And Columns, specify Row Height and Column Width options, and then click OK.

Note: *If you select At Least to set a minimum row height, rows increase in height as you add text or increase the point size. If you select Exactly to set a fixed row height, the row height does not change when you add or remove text. A fixed row height often results in an overset condition in the cell. (See "Work with overset cells" on page 239.)*

- Position the pointer over the edge of a column or row so that a double-arrow icon (↔ or ↕) appears, and then drag left or right to increase or decrease the column width, or drag up or down to increase or decrease row height.



Before and after dragging to resize rows

By default, row height is determined by the slug height of the current font. Thus, row height also changes if you change the point size of type for entire rows of text, or if you change the row height setting. The maximum row height is determined by the Maximum setting in the Rows And Columns section of the Cell Options dialog box.

Resize rows or columns without changing the table width

- Hold down Shift while dragging an inside row or column edge (not the table boundary). One row or column gets bigger as the other gets smaller.
- To resize rows or columns proportionally, hold down Shift while dragging the right table border or bottom table edge.

Holding down Shift while dragging the right table edge will resize all the columns proportionally; holding down Shift while dragging the bottom table edge will resize all rows proportionally.

Resize the entire table

❖ Using the Type tool T , position the pointer over the lower-right corner of the table so that the pointer becomes an arrow shape ↖↘, and then drag to increase or decrease the table size. Hold down Shift to maintain the table's height and width proportions.

Note: *If the table spans more than one frame in a story, you cannot use the pointer to resize the entire table.*

Distribute columns and rows evenly

1 Select cells in the columns or rows that should be the same width or height.

2 Choose Table > Distribute Rows Evenly or Distribute Columns Evenly.

Change the spacing before or after a table

1 Place the insertion point in the table and choose Table > Table Options > Table Setup.

2 Under Table Spacing, specify different values for Space Before and Space After, and then click OK.

Note that changing the spacing before the table does not affect the spacing of a table row that falls at the top of a frame.

Break tables across frames

Use Keep options to determine how many rows should remain together, or to specify where a row breaks, such as at the top of a column or frame.

When you create a table that is taller than the frame in which it resides, the frame is *overset*. If you thread the frame to another frame, the table continues in that frame. Rows move into threaded frames one at a time—you can't break a single row across multiple frames. Specify header or footer rows to repeat information in the new frame.

1 Position the insertion point in the appropriate row, or select a range of cells in the rows you want to keep together.

2 Choose Table > Cell Options > Rows And Columns.

3 To keep the selected rows together, select Keep With Next Row.

4 To cause the row to break in a specified location, select an option (such as In Next Frame) from the Start Row menu, and then click OK.

If you create a single table that spans both pages of a spread, you may want to add a blank column in the middle of the table to create inset margins.

See also

"Add table headers and footers" on page 228

Add text before a table

A table is anchored to the paragraphs that immediately precede and follow it. If you insert a table at the beginning of the text frame, you can't click above the table to place an insertion point. Instead, use the arrow keys to move the insertion point before the table.

❖ Place the insertion point at the beginning of the paragraph in the first cell, press the Left Arrow key, and begin typing.

Format text within a table

In general, use the same methods to format text in a table that you would use to format text that's not in a table.

See also

"Work with overset cells" on page 239

"Specify characters for decimal tabs" on page 207

Insert tabs into a table cell

When the insertion point is in a table, pressing Tab moves the insertion point to the next cell. However, you can insert a tab within a table cell. Use the Tabs panel to define tab settings in the table. Tab settings affect the paragraph in which the insertion point is placed.

1 Using the Type tool T, place the insertion point where you want to insert a tab.

2 Choose Type > Insert Special Character > Other > Tab.

To change tab settings, select the columns or cells you want to affect, choose Type > Tabs to display the Tabs panel, and then adjust tab settings.

Note: *When you use the Tabs ruler to apply a decimal tab to a cell or group of cells, you usually don't need to press Tab at the beginning of each paragraph to decimal-align the text in the cells. Paragraphs are automatically aligned on the decimal character, unless the paragraph contains additional formatting, such as center alignment, that overrides the decimal tab.*

Change the alignment of text within a table cell

1 Using the Type tool T, select the cell or cells you want to affect.

2 Choose Table > Cell Options > Text.

3 Under Vertical Justification, select an Align setting: Align Top, Align Center, Align Bottom, or Justify Vertically.

4 For First Baseline, select an option to determine how text is to be offset from the top of the cell.

5 Click OK.

Note: *To change the horizontal alignment of text within a cell, use the alignment option in the Paragraph panel. To align text in a cell to a decimal tab, use the Tabs panel to add a decimal tab setting.*

Rotate text in a cell

1 Position the insertion point in the cell you want to rotate, or select the cells you want to affect.

2 Choose Table > Cell Options > Text, or display the Table panel.

3 Select a value for Rotation, and click OK.

Change cell inset spacing

1 Using the Type tool T, place the insertion point in or select the cell or cells you want to affect.

2 Choose Table > Cell Options > Text, or display the Table panel.

3 Under Cell Insets, specify values for Top, Bottom, Left, and Right, and then click OK.

In many cases, increasing the cell inset spacing will increase the row height. If the row height is set at a fixed value, make sure that you leave enough room for the inset values, to avoid causing overset text.

Merge and split cells

You can merge (combine) or split (divide) cells in a table.

Merge cells

You can combine two or more cells in the same row or column into a single cell. For example, you can merge the cells in the top row of the table to create a single cell to be used for the table title.

1 Using the Type tool T, select the cells you want to merge.

2 Choose Table > Merge Cells.

Unmerge cells

❖ Place the insertion point in the merged cell and choose Table > Unmerge Cells.

Split cells

You can split cells horizontally or vertically, which is especially useful when creating form tables. You can select multiple cells and split them vertically or horizontally.

1 Place the insertion point in the cell you want to split, or select a row, column, or block of cells.

2 Choose Table > Split Cell Vertically or Split Cell Horizontally.

Work with overset cells

In most cases, a table cell will expand vertically to accommodate new text and graphics being added. However, if you set a fixed row height and add text or graphics that are too large for the cell, a small red dot appears in the lower-right corner of the cell, indicating that the cell is overset.

You cannot flow overset text into another cell. Instead, edit or resize the contents, or expand the cell or the text frame in which the table appears.

In the case of inline graphics or text with fixed leading, it is possible for the cell contents to extend beyond cell edges. You can select the Clip Contents To Cell option, so that any text or inline graphics that otherwise extend beyond any cell edge are clipped to the cell boundary. However, when inline graphics are overset to extend beyond cell bottom edges (Horizontal), this does not apply.

Display the contents of an overset cell

❖ Do one of the following:

- Increase the size of the cell.
- Change the text formatting. To select the cell's contents, click in the overset cell, press Esc, and then use the Control panel to format the text.

Clip an image in a cell

If an image is too large for a cell, it extends beyond the cell borders. You can clip the parts of the image that extend beyond the cell borders.

1 Place the insertion point in the cell you want to clip, or select the cell or cells you want to affect.

2 Choose Table > Cell Options > Text.

3 Select Clip Contents To Cell, and then click OK.

Table strokes and fills

About table strokes and fills

You can add strokes and fills to your tables in a number of ways. Use the Table Options dialog box to change the stroke of the table border, and to add alternating strokes and fills to columns and rows. To change the strokes and fills of individual cells or header/footer cells, use the Cell Options dialog box, or use the Swatches, Stroke, and Color panels.

By default, the formatting you select using the Table Options dialog box overrides any corresponding formatting previously applied to table cells. However, if you select the Preserve Local Formatting option in the Table Options dialog box, the strokes and fills applied to individual cells are not overridden.

If you use the same formatting repeatedly for tables or cells, create and apply table styles or cell styles.

See also

"Table and cell styles" on page 243

Change the table border

You can change the table border by using either the Table Setup dialog box or the Stroke panel.

1 With the insertion point in the table, choose Table > Table Options > Table Setup.

2 Under Table Border, specify the desired weight, type, color, tint, and gap settings. (See "Table stroke and fill options" on page 242.)

3 Under Stroke Drawing Order, select the drawing order from the following options:

Best Joins If selected, row strokes will appear to the front at the points where strokes of different colors cross. In addition, when strokes such as double lines cross, the strokes are joined and the crossing points are connected.

Row Strokes In Front If selected, row strokes appear in front.

Column Strokes In Front If selected, column strokes appear in front.

InDesign 2.0 Compatibility If selected, row strokes appear in front. In addition, when strokes such as double lines cross, they are joined and the crossing points are connected only at points where strokes cross in a T-shape.

4 If you do not want stroke formatting of individual cells to be overridden, select Preserve Local Formatting.

5 Click OK.

If you remove the stroke and fill from a table, choose View > Show Frame Edges to display the cell boundaries of a table.

Add stroke and fill to cells

You can add stroke and fill to cells using the Cell Options dialog box, Stroke panel, or Swatches panel.

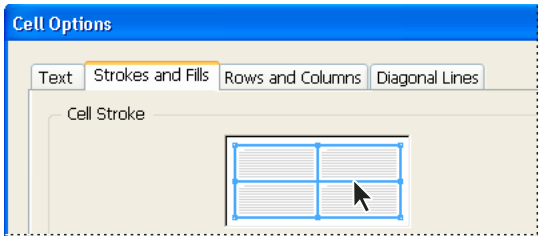
Add stroke and fill using Cell Options

You can determine which cell lines are formatted with a stroke or fill by selecting or deselecting lines in the Preview proxy. If you want to change the appearance of all rows or columns in the table, use an alternating stroke or fill pattern in which the second pattern is set to 0.

1 Using the Type tool T, place the insertion point in or select the cell or cells in which you want to add a stroke or fill. To add a stroke or fill to header/footer rows, select the header/footer cells at the beginning of the table.

2 Choose Table > Cell Options > Strokes And Fills.

3 In the proxy preview area, specify which lines will be affected by stroke changes. For example, if you want to add a heavy stroke to the outside lines but not to the inside lines of the selected cells, click an inside line to deselect it. (Selected lines are blue; deselected lines are gray.)



Select the lines you want to affect in proxy preview area.

In the proxy preview area, double-click any outside line to select the entire outer selection rectangle. Double-click any inside line to select the inside lines. Triple-click anywhere in the proxy to select or deselect all lines.

4 For Cell Stroke, specify desired weight, type, color, tint, and gap settings. (See "Table stroke and fill options" on page 242.)

5 For Cell Fill, specify desired color and tint settings.

6 Select Overprint Stroke and Overprint Fill if desired, and then click OK.

Add a stroke to cells by using the Stroke panel

The Stroke panel is available in InDesign, not InCopy.

1 Select the cell or cells you want to affect. To apply a stroke to header or footer cells, select the header or footer row.

2 Choose Window > Stroke to display the Stroke panel.

3 In the proxy preview area, specify which lines will be affected by stroke changes.

4 In the Tools panel, make sure the Object button is selected. (If the Text button T is selected, the stroke changes will affect the text, not the cells.)

5 Specify a weight value and stroke type.

Add a fill to cells

1 Select the cell or cells you want to affect. To apply a fill to header or footer cells, select the header or footer row.

2 Choose Window > Swatches to display the Swatches panel.

3 Make sure the Object button is selected. (If the Text button T is selected, the color changes will affect the text, not the cells.)

4 Select a swatch.

Add a gradient to cells

1 Select the cells you want to affect. To apply a gradient to header or footer cells, select the header or footer row.

2 Choose Window > Gradient to display the Gradient panel.

3 Click in the Gradient Ramp to apply a gradient to the selected cells. Adjust the gradient settings as necessary.

Add diagonal lines to a cell

1 Using the Type tool T, place the insertion point in or select the cell or cells in which you want to add diagonal lines.

2 Choose Table > Cell Options > Diagonal Lines.

3 Click the button for the type of diagonal line you want to add.

4 Under Line Stroke, specify desired weight, type, color, and gap settings; specify a Tint percentage and Overprint options.

5 From the Draw menu, choose Diagonal In Front to place the diagonal line in front of the cell contents; choose Content In Front to place the diagonal line behind the cell contents, and then click OK.

Table stroke and fill options

When selecting strokes and fills for the table or cells, use the following options:

Weight Specifies the line thickness for the table or cell border.

Type Specifies the line style, such as Thick - Thin.

Color Specifies the color of the table or cell border. The choices listed are those available in the Swatches panel.

Tint Specifies the percentage of ink of the specified color to be applied to the stroke or fill.

Gap Color Applies a color to the areas between the dashes, dots, or lines. This option is not available if Solid is selected for Type.

Gap Tint Applies tint to the areas between the dashes, dots, or lines. This option is not available if Solid is selected for Type.

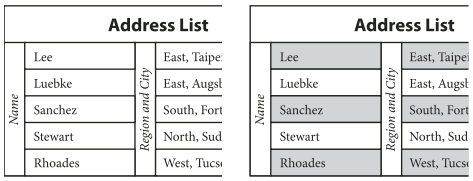
Overprint When selected, causes the ink specified in the Color drop-down list to be applied over any underlying colors, rather than knocking out those inks.

Alternate strokes and fills in a table

You can alternate strokes and fills to enhance readability or improve the appearance of your table. Alternating strokes and fills in table rows does not affect header and footer rows. However, alternating strokes and fills in columns does affect header and footer rows.

Alternating stroke and fill settings override cell stroke formatting, unless you select the Preserve Local Formatting option in the Table Options dialog box.

If you want to apply a fill or stroke to every body cell in the table, and not just alternating patterns, you can still use the alternating stroke and fill settings to create such non-alternating patterns. To create such an effect, specify 0 for Next in the second pattern.



Before (left) and after (right) alternating fills in a table

Add alternating strokes to a table

1 With the insertion point in the table, choose Table > Table Options > Alternating Row Strokes or Alternating Column Strokes.

2 For Alternating Pattern, select the type of pattern you want to use. Select Custom if you want to specify a pattern; for example, one column with a thick black line followed by three columns with thin yellow lines.

3 Under Alternating, specify the stroke or fill options for both the first pattern and the next pattern. For example, you may want to add a solid stroke to the first column and a Thick - Thin line to the next column, so that they alternate. Specify 0 for Next if you want the strokes to affect every row or column.

Note: *In tables that span multiple frames, alternating strokes and fills for rows do not restart at the beginning of additional frames in the story. (See "Break tables across frames" on page 237.)*

4 Select Preserve Local Formatting if you want formatted strokes previously applied to the table to remain in effect.

5 For Skip First and Skip Last, specify the number of rows or columns at the beginning and end of the table in which you do not want stroke attributes to appear, and then click OK.

Add alternating fills to a table

1 With the insertion point in the table, choose Table > Table Options > Alternating Fills.

2 For Alternating Pattern, select the type of pattern you want to use. Select Custom if you want to specify a pattern, such as one row shaded in gray followed by three rows shaded in yellow.

3 Under Alternating, specify the stroke or fill options for both the first pattern and the subsequent pattern. For example, if you selected Every Second Column for Alternating Pattern, you may want to shade the first two columns in a gray tint and leave the next two columns blank. Specify 0 for Next if you want the fill to apply to every row.

4 Select Preserve Local Formatting if you want previously formatted fills applied to the table to remain in effect.

5 For Skip First and Skip Last, specify the number of rows or columns at the beginning and end of the table in which you do not want fill attributes to appear, and then click OK.

Turn off alternating strokes and fills in a table

1 Place the insertion point in the table.

2 Choose Table > Table Options > Alternating Row Strokes, Alternating Column Strokes, or Alternating Fills.

3 For Alternating Pattern, choose None, and then click OK.

Table and cell styles

About table and cell styles

Just as you use text styles to format text, you can use table and cell styles to format tables. A *table style* is a collection of table formatting attributes, such as table borders and row and column strokes, that can be applied in a single step. A *cell style* includes formatting such as cell insets, paragraph styles, and strokes and fills. When you edit a style, all tables or cells to which the style is applied are updated automatically.

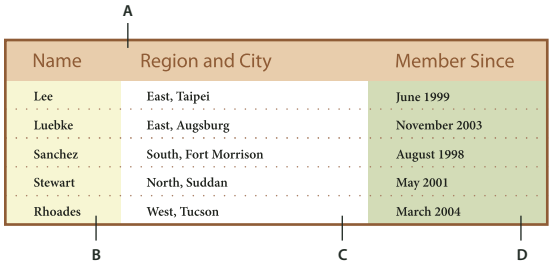
Note: *There is one important difference between text styles and table styles. While all character styles attributes can be part of a paragraph style, cell style attributes are not part of the table style. For example, you cannot use a table style to change the border color of interior cells. Instead, create a cell style and include it in the table style.*

[Basic Table] and [None] styles

By default, each new document contains a [Basic Table] style that can be applied to tables you create and a [None] style that can be used to remove cell styles applied to cells. You can edit the [Basic Table] style, but you can't rename or delete either [Basic Table] or [None].

Using cell styles in table styles

When you create a table style, you can specify which cell styles are applied to different regions of the table: header and footer rows, left and right columns, and body rows. For example, for the header row, you can assign a cell style that applies a paragraph style, and for the left and right columns, you can assign different cell styles that apply shaded backgrounds.



Cell styles applied to regions in table style
A. *Header row formatted with cell style that includes paragraph style* ***B.*** *Left column* ***C.*** *Body cells* ***D.*** *Right column*

Cell style attributes

Cell styles do not necessarily include all the formatting attributes of a selected cell. When you create a cell style, you can determine which attributes are included. That way, applying the cell style changes only the desired attributes, such as cell fill color, and ignores all other cell attributes.

Formatting precedence in styles

If a conflict occurs in formatting applied to a table cell, the following order of precedence determines which formatting is used:

Cell style precedence 1. Header/Footer 2. Left column/Right column 3. Body rows. For example, if a cell appears in both the header and the left column, the formatting from the header cell style is used.

Table style precedence 1. Cell overrides 2. Cell style 3. Cell styles applied from a table style 4. Table overrides 5. Table styles. For example, if you apply one fill using the Cell Options dialog box and another fill using the cell style, the fill from the Cell Options dialog box is used.

For a video tutorial on using table styles, see www.adobe.com/go/vid0084.

Table/Cell Styles panels overview

Use the Table Styles panel to create and name table styles, and to apply the styles to existing tables or tables you create or import. Use the Cell Styles panel to create and name cell styles, and to apply the styles to table cells. Styles are saved with a document and appear in the panel each time you open that document. You can save table and cell styles in groups for easier management.

When you position the insertion point in a cell or table, any style that is applied is highlighted in either of the panels. The name of any cell style that is applied through a table style appears in the lower left corner of the Cell Styles area. If you select a range of cells that contains multiple styles, no style is highlighted and the Cell Styles panel displays "(Mixed)."

Open the Table Styles or Cell Styles panel

❖ Choose Window > Type & Tables, and choose Table Styles or Cell Styles.

Change how styles are listed in the panel

- Select Small Panel Rows to display a condensed version of the styles.
- Drag the style to a different position. You can also drag styles to groups that you create.
- Choose Sort By Name from the panel menu to list the styles alphabetically.

Define table and cell styles

If you work with a standalone story, you can define, modify, and apply table and cell styles in InCopy. If the styles you want exist in another InCopy document, you can import those styles into the current document. You cannot import table or cell styles from an InDesign document.

For a video tutorial on using table styles, see www.adobe.com/go/vid0084.

1 If you want to base a new style on the formatting of an existing table or cell, place the insertion point in a cell.

2 If desired, define a paragraph style for the cell style.

3 Choose New Table Style from the Table Styles panel menu, or choose New Cell Style from the Cell Styles panel menu.

4 For Style Name, type a name.

5 For Based On, select which style the current style is based on.

6 To define a style shortcut, position the insertion point in the Shortcut text box and make sure that Num Lock is on. Then hold down any combination of Shift, Alt, or Ctrl (Windows) or Shift, Option, and Command (Mac OS), and press a number on the numeric keypad. You cannot use letters or non-keypad numbers for defining style shortcuts.

7 To specify the formatting attributes, click a category on the left and specify the attributes you want. For example, to assign a paragraph style to a cell style, click the General category, and then choose the paragraph style from the Paragraph Style menu.

For cell styles, options that don't have a setting specified are ignored in the style. If you don't want a setting to be part of the style, choose (Ignore) from the setting's menu, delete the contents of the field, or click a check box until a small box appears in Windows or a hyphen (-) appears in Mac OS.

8 If you want the new style to appear in a style group you've created, drag it to the style group folder.

See also

"Group styles" on page 181

Table Styles video

Load (import) table styles from other documents

You can import table and cell styles from an InDesign or InCopy document into a standalone InCopy document or InCopy content that is linked to InDesign. You can determine which styles are loaded, and what should occur if a loaded style has the same name as a style in the current document.

Note: *If you import styles into linked content, new styles are added to the InDesign document when the content is updated, and any style with a name conflict is overridden by the InDesign style with the same name.*

1 From the menu of the Cell Styles or Table Styles panel, choose Load Cell Styles, Load Table Styles, or Load Table And Cell Styles.

2 Double-click the InDesign document containing the styles you want to import.

3 In the Load Styles dialog box, make sure that a check mark appears next to the styles you want to import. If any existing style has the same name as one of the imported styles, choose one of the following options under Conflict With Existing Style, and then click OK:

Use Incoming Style Definition Overwrites the existing style with the loaded style and applies its new attributes to all cells in the current document that used the old style. The definitions of the incoming and existing styles appear at the bottom of the Load Styles dialog box so you can compare them.

Auto-Rename Renames the loaded style. For example, if both documents have a style named "Table Style 1," the loaded style is renamed "Table Style 1 copy" in the current document.

Apply table and cell styles

Unlike paragraph and character styles, table and cell styles do not share attributes, so applying a table style does not override cell formatting, and applying a cell style does not override table formatting. By default, applying a cell style removes formatting applied by any previous cell style, but does not remove local cell formatting. Similarly, applying a table style removes formatting applied by any previous table style, but does not remove overrides made using the Table Options dialog box.

In the Styles panel, a plus sign (+) appears next to the current cell or table style if the selected cell or table has additional formatting that isn't part of the applied style. Such additional formatting is called an *override*.

1 Position the insertion point in a table, or select the cells to which you want to apply the style.

2 Do one of the following:

- Click the table or cell style in the Table Styles or Cell Styles panel. If the style is in a style group, expand the style group to locate the style.
- Press the shortcut you defined for the style. (Make sure that Num Lock is on.)

Base one table or cell style on another

You can create links between similar table or cell styles by creating a base, or *parent*, style. When you edit the parent style, any changed attribute that appears in the *child* styles will change as well. By default, table styles are based on [No Table Style], and cell styles are based on [None].

1 Create a new style.

2 In the New Table Style or New Cell Style dialog box, select the parent style in the Based On menu. The new style becomes the child style.

3 Specify formatting for the new style to distinguish it from the parent style.

See also

"Duplicate styles or style groups" on page 181

Edit table and cell styles

One of the advantages of using styles is that when you change the definition of a style, all of the tables or cells formatted with that style change to match the new style definition.

Note: *If you edit styles in InCopy content that's linked to an InDesign document, the modifications are overridden when the linked content is updated.*

1 Do one of the following:

- If you don't want the style to be applied to a selected table or cell, right-click (Windows) or Control-click (Mac OS) the style in the Styles panel, and choose Edit *[style name]*.
- In the Styles panel, double-click the style, or select the style and choose Style Options from the Styles panel menu. Note that this method applies the cell style to any selected cell or the table style to any selected table. If no table is selected, double-clicking a table style sets it as the default style for any table you create.

2 Adjust settings in the dialog box, and then click OK.

Delete table and cell styles

When you delete a style, you can select a different style to replace it, and you can choose whether to preserve the formatting.

1 Select the style in the Styles panel.

2 Do one of the following:

- Choose Delete Style from the panel menu.
- Click the Delete icon at the bottom of the panel, or drag the style to the Delete icon.
- Right-click (Windows) or Control-click (Mac OS) the style, and then choose Delete Style. This method is especially useful for deleting a style without applying it to the selected cell or table.

3 Select the style to replace it.

If you select [No Table Style] to replace a table style or [None] to replace a cell style, select Preserve Formatting to keep the formatting of the table or cell to which the style is applied. The table or cell preserves its formatting but is no longer associated with a style.

4 Click OK.

Redefine table or cell styles based on current formatting

After you apply a style, you can override any of its settings. If you decide you like the changes, you can redefine the style to retain the new formatting.

Note: *If you redefine styles in InCopy content linked to an InDesign document, the modifications are overridden when the linked content is updated.*

1 Place the insertion point in the table or cell that is formatted with the style you want to redefine.

2 Make changes to the table or cell as necessary.

3 Choose Redefine Style from the Styles panel menu.

Note: *For cell styles, changes to only those attributes that are part of the cell style will enable the Redefine Style command. For example, if the cell style includes a red fill and you override a cell to use a blue fill, you can redefine the style based on that cell. But if you change an attribute that is ignored in the cell style, you can't redefine the style with that attribute.*

Override table and cell styles

After you apply a table or cell style, you can override any of its settings. To override a table style, you can change options in the Table Options dialog box. To override a cell, you can change options in the Cell Options dialog box or use other panels to change the stroke or fill. If you select a table or cell that has an override, a plus sign (+) appears next to the style in the Styles panel.

You can clear table and cell overrides when you apply a style. You can also clear overrides from a table or cell to which a style has already been applied.

If a style has a plus sign (+) next to it, hover over the style to view a description of the override attributes.

Preserve or remove overrides while applying a table style

- To apply a table style and preserve cell styles but remove overrides, hold down Alt (Windows) or Option (Mac OS) as you click the style in the Table Styles panel.

- To apply a table style and remove both cell styles and overrides, hold down Alt+Shift (Windows) or Option+Shift (Mac OS) as you click the style in the Table Styles panel.

Right-click (Windows) or Control-click (Mac OS) the style in the Table Styles panel, and then choose Apply [table style], Clear Cell Styles to apply a style and clear cell styles.

Remove overrides while applying a cell style

❖ To apply a cell style and remove overrides, hold down Alt (Windows) or Option (Mac OS) as you click the name of the style in the Cell Styles panel.

Note: *Only those attributes that are part of the cell style are considered overrides. For example, if the cell style includes a red fill and all other attributes are ignored, changing a different cell option is not considered an override.*

Clear attributes not defined by a cell style

❖ Choose Clear Attributes Not Defined By Style from the Cell Styles panel menu.

Clear table or cell overrides

1 Select the table or cells containing the overrides.

2 In the Styles panel, click the Clear Overrides In Selection icon , or choose Clear Overrides from the Styles panel menu.

Break the link to table or cell styles

When you break the link between tables or cells and the style applied to them, the tables or cells retain their current formatting. However, future changes to that style won't affect them.

1 Select the cells to which the style has been applied.

2 Choose Break Link To Style from the Styles panel menu.

Chapter 9: Printing

Typically, the final printing process is done in Adobe® InDesign®, but you can use Adobe InCopy® to print drafts of your stories in Galley, Story, or Layout view.

Setting up a printer

Printing with InCopy

InCopy typically links with an InDesign master document. The InDesign document is usually the ultimate source for the final printing process, so many of the controls needed for production-quality printing are reserved for InDesign. However, you can use InCopy to print drafts of your stories in either Galley, Story, or Layout view. The printed copy looks similar to the document on the screen, depending on the view and print settings:

- In the Galley or Story view, InCopy prints unformatted text in a continuous column (or columns). You do not see the document layout and formatting features.
- In the Layout view, InCopy prints the document as it appears on the screen, with frames and all other page elements intact.

  InCopy works with both Adobe PostScript® and non-PostScript printers, as well as other kinds of printing devices. If you are using a PostScript printer, make sure that you have the printer driver with the correct, properly installed PostScript Printer Description (PPD) file.

  Important: *InCopy does not support the format used by PDF Writer. If you attempt to print to PDF Writer, you will experience delays or errors in printing.*

See also

"Exporting to Adobe PDF" on page 255

About printer drivers

A printer driver lets you directly access printer features from applications on your computer. Having the correct driver ensures that you have access to all of the features a particular printer supports.

Adobe recommends using the latest printer drivers, which are listed in the following table. If you encounter problems with an older driver, upgrade to the latest driver for your operating system.

Operating system	Printer driver
Windows® XP	Pscript 5 (system driver)
Mac OS 10.2 (or later)	Built-in PS Driver for Mac OS X

For more information on recommended and supported PostScript printer drivers, including installation instructions, search the section on printer drivers on the Adobe website.

Some InCopy printing features appear in both the Print dialog box of InCopy and the printer driver dialog boxes. In general, you should set options for such overlapping features only in the InCopy Print dialog box; InCopy ignores duplicate settings specified in the printer driver dialog box. The instructions in this section can help you work with the overlapping options.

Printer drivers may support features that are not included in InCopy, such as duplex printing. Support for these features varies depending on the printer driver you have. Check with your printer manufacturer for details.

If you want to specify settings for a specific printer, InCopy provides access to the printer driver through the Setup button in the InCopy Print dialog box. In Windows, this button opens the Properties dialog box for the currently selected printer. In Mac OS, this button displays the standard Mac OS Print dialog box.

Select a PPD file

A *PPD file* (PostScript Printer Description file) customizes the behavior of the driver for your specific PostScript printer. It contains information about the output device, including printer-resident fonts, available media sizes and orientation, optimized screen frequencies, screen angles, resolution, and color output capabilities. It's important to set up the correct PPD before you print. Selecting the PPD that corresponds to your PostScript printer or imagesetter populates the Print dialog box with the available settings for the output device. You can switch to a different one to suit your needs. Applications use the information in the PPD file to determine which PostScript information to send to the printer when printing a document.

For best printing results, Adobe recommends that you obtain the latest version of the PPD file for your output device from the manufacturer. Many print service providers and commercial printers have PPDs for the imagesetters they use. Be sure to store PPDs in the location specified by the operating system. For details, consult the documentation for your operating system.

❖ In Windows and in Mac OS, you select a PPD file in the same way you add a printer. The steps for selecting a PPD file are different for each platform. See your operating system documentation for details.

Printing stories

Print the Galley or Story view

When you print the Galley or Story view, InCopy prints unformatted text in a continuous column (or columns), without layout and formatting features. Printing in Galley or Story view gives you a hard copy that resembles galleys in traditional publishing. The galley format makes it easy to concentrate on the textual content of a story, and to see the changes made by you and other contributors.

1 Choose File > Print.

2 Choose Galley & Story from the View option in the Print dialog box.

3 In the Print dialog box, specify the following options:

- Type the number of copies to print.
- Select the paper size from the list.
- Choose the paper orientation.
- Choose whether to print All stories, Current Story, or All Expanded.

Note: *The All Expanded option is active only when you are working with linked InCopy files.*

4 In the Options section, specify whether you want to Use Current Galley Settings or Override Current Galley Settings. If you choose Override Current Galley Settings, select which information you want to print.

5 To include the document name, number of pages, and print time on the printed page, select Print Page Information.

6 For a summary of information related to the story, select Print Story Information. This prints the information contained in the Content File Info dialog box.

7 Click Print.

Note: *If your document does not print correctly, make sure that the correct printer driver is installed.*

See also

"Setting up a printer" on page 249

Print the Layout view

When you print the Layout view, InCopy prints the document as it appears on the screen, with frames and all other page elements intact.

Note: *Because InCopy is not designed for production-quality printing, it does not include controls for trapping, printer's marks, color separations, and certain graphics-related printing functions. InCopy handles only composite printing.*

1 Choose File > Print.

2 Select Layout from the View options in the Print dialog box.

3 Specify the following options:

- Type the number of copies to print.
- Select the paper size from the list.
- Choose the paper orientation.
- Choose to print all stories or specify the range of pages to print in the Current story.

4 Choose whether or not you want to scale the document.

5 To print the images included in the document, select Print Images.

6 To print facing pages on the same sheet, select Print Spreads.

7 To include the document name, number of pages, and print time on the printed page, select Print Page Information.

8 Click Print.

Note: *If your document does not print correctly, make sure that the correct print driver is installed.*

Create a standard PostScript file

As an alternative to printing a document to a printer, you can save an Adobe PostScript® language description of the document as a file for printing on remote printers. A standard PostScript (.ps) file contains a description of everything in your document, including information about linked files and instructions tailored to the currently selected output device.

A PostScript file is usually larger than the original InCopy document. Once you create the PostScript file, you can copy it to a disk or other removable storage device, or send it to another computer for printing.

Note: *Be sure to save the PostScript file to your hard drive before transferring the file to a network drive or removable media. The slower access time between the hard drive and other drives can cause file corruption or loss of data, and might damage your document.*

1 Choose File > Print.

2 Click Setup.

3 Depending on your operating system, do one of the following:

- (Windows) Select Print To File. Click Print.
- (Mac OS) From the PDF menu, choose Save PDF As PostScript. Enter a name and location for the file when prompted, and click Save.

4 Change the existing settings in the InCopy Print dialog box, if necessary. InCopy uses the current page range when creating the PostScript file.

5 Click Print.

6 (Windows) Enter a name and location for the file, and click Save.

See also

"Exporting to Adobe PDF" on page 255

Change the default print setting

You can save print settings with the application, so that new InCopy documents use the same print settings. In Mac OS, these print settings also become the default for the printer. You can override individual print settings.

1 Choose File > Print, and adjust the default print settings as desired.

2 Click Save Settings.

Any subsequent overrides to these saved settings are discarded at the completion of the print job.

Scale documents

When you print from Layout view, you can control how your document pages fit on the chosen paper size by scaling. The maximum page size you can print from a Windows system is 129 by 129 inches. To fit an oversized document on a smaller piece of paper, you can scale the document width and height either symmetrically or asymmetrically. You can also automatically scale the pages to fit the imageable area of the current paper size. Scaling does not affect the size of the pages in the document.

Scale a document manually

1 In Layout view, choose File > Print.

2 To maintain the current document proportions of width to height, select Constrain Proportions. To scale the document asymmetrically, make sure this option is deselected.

3 Type percentages from 1 to 1000 in the Width and Height boxes. If you selected Constrain Proportions, you need to enter only one value; the other is updated automatically.

4 Click Print.

Scale a document automatically

1 In Layout view, choose File > Print.

2 Select Scale To Fit. The scaling percentage, which is determined by the imageable area defined by the selected PPD, appears next to the Scale To Fit option.

3 Click Print.

Chapter 10: PDF

Exporting Adobe® InCopy® documents to Adobe PDF preserves the look and content of the original documents. PDF files can be viewed in Adobe Acrobat® or Adobe Reader® on almost any platform.

Understanding Adobe PDF

About Adobe PDF

Portable Document Format (PDF) is a universal file format that preserves the fonts, images, and layout of source documents created on a wide range of applications and platforms. Adobe PDF is the standard for the secure, reliable distribution and exchange of electronic documents and forms around the world. Adobe PDF files are compact and complete, and can be shared, viewed, and printed by anyone with free Adobe Reader® software.

Adobe PDF is highly effective in print publishing workflows. By saving a composite of your artwork in Adobe PDF, you create a compact, reliable file that you or your service provider can view, edit, organize, and proof. Then, at the appropriate time in the workflow, your service provider can either output the Adobe PDF file directly, or process it using tools from various sources for such post-processing tasks as preflight checks, trapping, imposition, and color separation.

When you save in Adobe PDF, you can choose to create a PDF/X-compliant file. PDF/X (Portable Document Format Exchange) is a subset of Adobe PDF that eliminates many of the color, font, and trapping variables that lead to printing problems. PDF/X may be used wherever PDFs are exchanged as digital masters for print production—whether at the creation or output stage of the workflow, as long as the applications and output devices support PDF/X.

Adobe PDFs can solve the following problems associated with electronic documents:

Common problem	Adobe PDF solution
Recipients can't open files because they don't have the applications used to create the files.	Anyone, anywhere can open a PDF. All you need is the free Adobe Reader software.
Combined paper and electronic archives are difficult to search, take up space, and require the application in which a document was created.	PDFs are compact and fully searchable, and can be accessed at any time using Reader. Links make PDFs easy to navigate.
Documents appear incorrectly on handheld devices.	Tagged PDFs allow text to reflow for display on mobile platforms such as Palm OS®, Symbian™, and Pocket PC® devices.
Documents with complex formatting are not accessible to visually impaired readers.	Tagged PDFs contain information on content and structure, which makes them accessible on-screen readers.

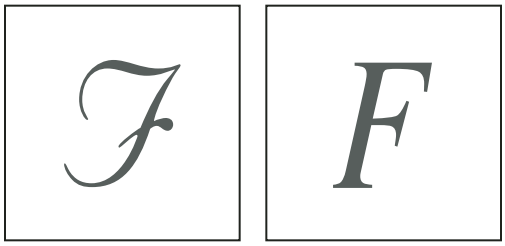
Embedding and substituting fonts

InCopy embeds a font only if it contains a setting by the font vendor that permits it to be embedded. Embedding prevents font substitution when a reader views or prints the file, and ensures that readers see the text in its original font. Embedding increases the file size only slightly, unless the document uses CID (*multibyte*) fonts, a font format commonly used for Asian languages, where multiple characters are combined to create a single glyph.

For each font embedded, InCopy can embed the entire font or just a subset—the particular characters, called *glyphs,* used in the file. Subsetting ensures that your fonts and font metrics are used at print time by creating a custom font name. The subsetting options you choose affect disk space and your ability to do late-stage editing.

If InCopy cannot embed a font, it temporarily substitutes the font with a Multiple Master typeface: either AdobeSerMM for a missing serif font, or AdobeSanMM for a missing sans serif font.

These typefaces can stretch or condense to fit, to ensure that line and page breaks are maintained from the original document. The substitution cannot always match the shape of the original characters, however, especially if the characters are unconventional ones, such as script typefaces.



If characters are unconventional (left), the substitution font cannot always match (right).

See also

"Exporting to Adobe PDF" on page 255

About compression

When exporting to Adobe PDF, InCopy automatically downsamples images, crops image data to the image's frame, and compresses text and line art using the lossless ZIP method. ZIP works well on images with large areas of single colors or repeating patterns, and for black-and-white images that contain repeating patterns. Because InCopy uses the lossless ZIP method, data is not removed to reduce file size, so image quality is not affected.

Exporting to Adobe PDF

Export an InCopy document to Adobe PDF

You can export InCopy documents directly to Adobe PDF. You can export in the Galley, Story, or Layout view. If you export in Layout view, the result is a PDF document with layout and design elements intact. In contrast, a document exported in Galley or Story view resembles the text-only look that you see in Galley or Story view within InCopy. You might want to export the Galley or Story view of an InCopy story to PDF for writers, editors, and others in a document-review cycle who may not have InCopy on their computers. The PDF document has the same advantages that an InCopy Galley and Story view offers, including maximum text readability and annotation features.

Note: *Adobe PDF files exported from Adobe InDesign® documents that contain overprints or transparency effects are best viewed in Acrobat 6.0 and later with the Overprint Preview option selected.*

1 Choose File > Export.

2 For Save As Type (Windows) or Format (Mac OS), choose Adobe PDF. Type a file name, choose a location for the file, and then click Save.

3 Select Galley & Story or Layout from the View menu.

4 Change settings as desired.

The settings you specify are saved with the application, and are applied to every new InCopy document you export to PDF until you choose new settings.

5 Click Export.

Note: *When exporting to PDF, InCopy preserves links from Open Prepress Interface (OPI) comments for images in the InDesign document. OPI links let the InDesign user include fast, low-resolution versions (proxies) of images for positioning on a page. For final output, either InDesign or a prepress service provider can automatically replace the proxies with high-resolution versions.*

Common Adobe PDF options

There are several options that are common to the Galley, Story, and Layout views when exporting a document to PDF.

Compatibility Sets the compatibility level of the Adobe PDF file. For documents that will be distributed widely, consider choosing Acrobat 5 (PDF 1.4) to ensure that all users can view and print the document. If you create files with Acrobat 8 (PDF 1.7) compatibility, the resulting PDF files may not be compatible with earlier versions of Acrobat.

Subset Fonts When Percent Of Characters Used Is Less Than Sets the threshold for embedding complete fonts based on how many of the fonts' characters are used in the document. If the percentage of characters used in the document for any given font is exceeded, then that specific font is completely embedded. Otherwise, the font is subsetted. Embedding complete fonts increases PDF file size, but if you want to make sure you completely embed all fonts, enter 0 (zero).

Include Page Information Includes the document name, page number, and date and time the file was exported.

View PDF After Exporting Opens the PDF file in the latest version of Acrobat currently installed on your computer. For accurate results, make sure that the compatibility option matches the latest version of Acrobat installed.

Adobe PDF options for Galley and Story views

The PDF Export dialog box contains options specific to Galley and Story views.

Stories Exports a single story or multiple stories.

Fonts Includes settings for font family and style, type size, and leading for the exported file. These settings do not change the screen view settings in the Galley & Story Display preferences.

Include Story Information The document title, author, and description appear in the exported PDF file.

Include Paragraph Styles Paragraph style information from the information column shown in Galley and Story views appears in the exported PDF file.

Include Inline Notes Exports all (or only visible) inline notes contained in the document. To include the note colors assigned to individuals on the project, select Show Notes Backgrounds In Color.

Include Tracked Changes Exports all (or only visible) tracked changes contained in the document. To include the editing colors assigned to individuals on the project, select Show Tracked Changes Backgrounds In Color.

Include Accurate Line Endings Exports line endings as they appear in the story. If unchecked, the lines of text wrap according to the width and orientation of the widest story window.

Include Line Numbers Exports with line numbers displayed in the information column. This option is available only if Include Accurate Line Endings is selected.

Fill Page (Use Multiple Columns) Exports the story using the number and width of columns you specify. This option is available only if Include Accurate Line Endings is selected.

Note: *Selecting a small column width and a large font size (in the Fonts section of this section) can cause text to overlap in the exported output.*

Adobe PDF options for Layout view

The following options are available only when exporting from Layout view:

All Exports all pages in the current document or book. This is the default setting.

Range Specifies the range of pages to export in the current document. You can type a range by using a hyphen, and separate multiple pages or ranges by using commas. This option is unavailable when you're exporting books.

Spreads Exports pages together as if they were bound, or printed on the same sheet.

Important: *Do not select Spreads for commercial printing; if you do, the service provider cannot impose the pages.*

Include Notes As Annotation Exports all notes as PDF annotations.

Interactive Elements Exports all movies, sounds, and buttons. Acrobat 4.0 and 5.0 require that sounds be embedded and movies be linked. Acrobat 6.0 and later supports linking and embedding of movies and sounds.

Multimedia Lets you specify how to embed or link movies and sounds:

- **Use Object Settings** Embeds movies and sounds according to the settings in the Sound Options and Movie Options dialog box.
- **Link All** Links sound and movie clips placed in the document. If you choose not to embed media clips in the PDF file, be sure to place the media clips in the same folder as the PDF.
- **Embed All** Embeds all movies and sounds, regardless of embed settings on individual objects.

Note: *The Multimedia option is only available when Compatibility is set to Acrobat 6 (PDF 1.5) or later and Interactive Elements is selected. When Compatibility is set to Acrobat 4 (PDF 1.3) or Acrobat 5 (PDF 1.4) and Interactive Elements is selected, InCopy uses the settings in the Use Object Settings option in the Multimedia menu.*

Optimize For Fast Web View Reduces PDF file size, and optimizes the PDF file for faster viewing in a web browser by restructuring the file for page-at-a-time downloading (byte serving).

Embed Page Thumbnails Creates thumbnail images within the exported PDF file.

See also

"Common Adobe PDF options" on page 256

Create secure PDF documents

You can restrict access to an Adobe PDF file when you export it. When files use security restrictions, any tools and menu items related to those features are dimmed.

You can secure a PDF file so that a user password is required to open it and a master password is required to change security settings. If you set any security restrictions in your file, you should also specify a master password; otherwise, anyone who opens the file could remove the restrictions. If a file is opened with a master password, the security restrictions are temporarily disabled. If the file has both passwords, you can open it with either one.

Note: *The Compatibility setting determines the encryption level. The Acrobat 4 (PDF 1.3) option uses a low encryption level (40-bit RC4), while the other options use a high encryption level (128-bit RC4 or AES).*

1 Choose File > Export.

2 For Save As Type (Windows) or Format (Mac OS), choose Adobe PDF. Specify a name and location for the file, and click Save.

3 Click Security Settings.

4 In the Passwords section, specify the password protection you want:

- Select Password Required To Open Document and, in the Document Open Password text box, enter the password users must enter before they can open the PDF file.
- Select Password Required To Change Permissions And Passwords and, in the Permissions Password text box, enter the password users must enter before they can set or change any security options in the PDF file.

Note: *You cannot use the same password in both text boxes.*

5 In the Permissions section, define the level of user actions allowed:

No Printing Prevents users from printing the Adobe PDF file.

No Changing The Document Prevents users from filling in forms or making any other changes to the Adobe PDF file.

No Content Copying Or Extraction, Disable Accessibility Prevents users from selecting text and graphics.

No Adding Or Changing Comments And Form Fields Prevents users from adding or changing notes and form fields if they open the PDF file in Adobe Acrobat or another PDF editor.

6 Click Save, and then click Export.

Chapter 11: XML

Adobe® InCopy® is one of many applications that can produce and use XML. After you tag content in an InCopy file, you save and export the file as XML so that it can be repurposed in InCopy, Adobe InDesign®, or another application.

Working with XML

About XML

XML (Extensible Markup Language) is a way to repurpose data in a file or automate the process of replacing the data in one file with data from another file. XML employs *tags* to describe parts of a file—a heading or a story, for example. These tags mark data so it can be stored in an XML file and handled appropriately when it is exported to other files. Think of XML as a translation mechanism for data. XML tags label text and other content in a file so that applications can recognize and present the data.

Extensible language

XML is considered an *extensible* language because individuals create their own XML tags—they can create one tag for each type of information that they want to repurpose. XML tags don't carry information about how data is supposed to be displayed or formatted. XML tags are strictly for identifying content.

In InCopy , for example, you can create a `Heading1` tag and assign it to each first-level heading in a document. After you save the document as an XML file, the Heading1 content can be imported and put to use—by any application that can read XML—as a web page, printed catalog, directory, price list, or database table.

Adobe InCopy is one of many applications that can produce and use XML. After you tag content in an InCopy file, you save and export the file as XML so that it can be repurposed in another InCopy file, InDesign file, or another application.

In InCopy , you can create XML tags and tag parts of a document even if you're not experienced with XML. InCopy handles XML programming behind the scenes and creates the XML for you when you export a document in XML format.

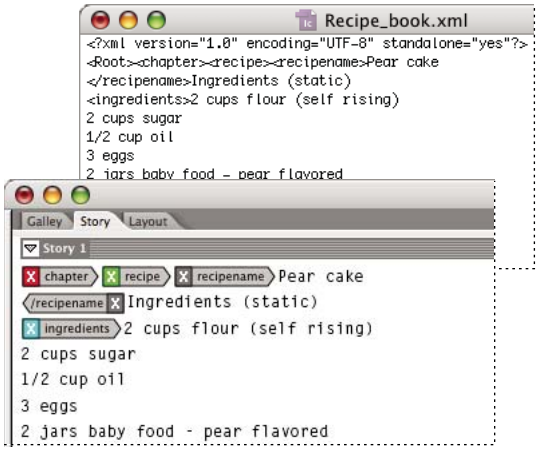
Important: *Do not confuse XML tags with InCopy tagged text. For more information about tagged text, which is a different method of exporting and importing InCopy content, view the Tagged Text PDF at www.adobe.com/go/learn_id_taggedtext_cs4_en(PDF).*

XML data structure

The *element* is the building block of XML data; an element is data that has been tagged. In XML files, elements are nested within other elements to create a hierarchical structure for the data.

You can see the structure of XML data in the Structure pane, which displays the hierarchy and sequence of elements. In the XML structure, child elements are contained by parent elements, which in turn may also be child elements. Or, seen from the other direction, parent elements contain child elements, and these child elements may in turn be parent elements to other child elements.

For example, in the following image, you can see a `chapter` element that contains (is the parent of) a `recipe` element. The `recipe` element, in turn, is the parent of elements called `recipename` and `ingredients`. All elements are contained inside the `Story` element, which always appears at the top of the Structure pane.



InCopy document formatted with XML tags

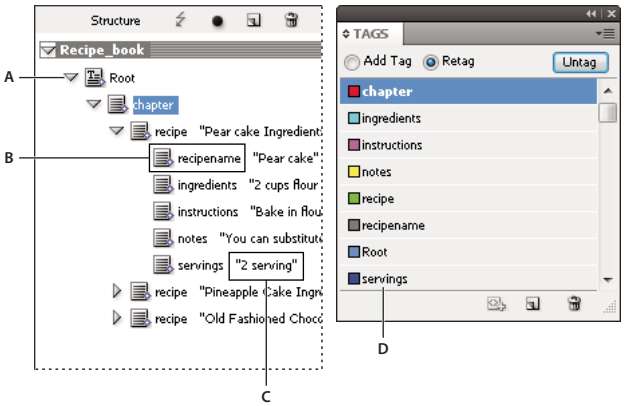
For more information on using XML in InDesign, visit www.adobe.com/go/learn_id_XMLscript.

See also

"Structure pane overview" on page 268

XML tools

InCopy provides the Structure pane and the Tags panel for working with XML content. The Structure pane displays all the elements in the document and their hierarchical structure. To help you identify each element, InCopy displays its element tag and an icon that indicates what type of content it holds. In addition, the Structure pane can display the first few words of text in an element, called a *text snippet*, which is not to be confused with snippet files that store objects for reuse.



Structure pane (left) and Tags panel (right)
***A.** Triangle to expand or collapse elements **B.** Element placed in layout **C.** Text snippet **D.** Element tag*

The Structure pane lets you view, edit, and manage XML elements. You use the Structure pane in many ways when working with XML. For example, to place imported XML content into the layout, you can drag elements from the Structure pane directly to a page. You also use the Structure pane to adjust the hierarchy of the elements. You can add elements, attributes, comments, and processing instructions by way of the Structure pane.

The Tags panel lists tags for elements. You can import, export, add, delete, and rename tags. You use the Tags panel to apply element tags to content that you plan to export to XML.

See also

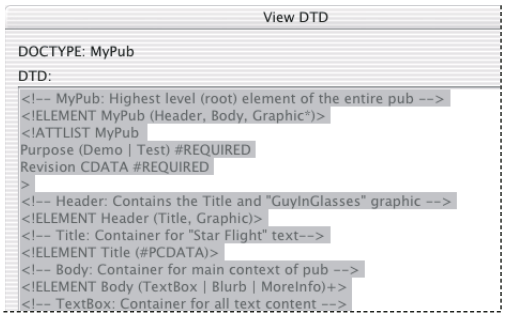
"Structure pane overview" on page 268

About DTD files

To share XML data with others, you need to agree on a standard set of tag names and element attributes so that everyone in your group uses and applies tags the same way. One method for handling the sharing of XML data is to use a document type definition (DTD) file.

A DTD file provides a set of elements and attributes for members of the group to use. It also defines the rules about where elements can appear in the structural hierarchy. For example, the DTD file may require the Title element to be a child of the Story element because the title is supposed to appear inside the story; if you tag a title without tagging the story it appears in, the DTD file marks the Title element as invalid. You can search for and flag invalid structural errors in an InDesign file with a DTD file. This process is called *validating*.

Although you cannot import a DTD file into InCopy, DTD files you import in InDesign are available when you edit the story in InCopy. You can view the DTD file in InCopy and validate stories against it to ensure that tags have been applied correctly.



DTD file opened for viewing in InCopy

You may find that a DTD file created by a group or industry similar to yours includes tags and structures that meet your needs. For a current list of registered DTDs, visit www.xml.com/pub/rg/DTD_Repositories (English only).

XML rule sets

XML rule sets are sets of instructions written in a scripting language (such as JavaScript or AppleScript) that evaluate XML data and take certain actions if that data meets certain conditions. Each rule consists of at least one condition and at least one action. A rule evaluates the XML data against the conditions, and if a condition is met, then it takes the appropriate action. For example, an XML rule can specify that whenever the Paragraph element appears under the Subhead element (a condition), a specific style (an action) is applied; or that whenever the Product element (a condition) appears, a new frame is created and a product image is imported (actions). XML rules are a means of dynamically creating and formatting layouts based on XML.

For information on XML rule sets and other XML scripting resources, see www.adobe.com/go/learn_id_XMLscript.

Preparing XML files for K4 or InCopy workflows

To prepare files with XML tagging for use within the K4 or InDesign/InCopy workflow environments, you may need to adjust how you prepare the structure and import XML into InDesign files.

There are two methods for importing XML into InDesign: merge and append. Merge can replace the existing structure, whereas append adds to any existing structure. In both cases, it is important that the root element is not associated with a text frame. Either use the default element named "Root" or rename this element based on your current workflow or requirement as needed, again being sure that it is not associated with a text frame.

For more information on using XML in K4 or InCopy workflows, contact your system administrator.

Using XML files

Open an XML file in InCopy

You can open any existing XML file in InCopy for editing and tagging.

1 Choose File > Open.

2 Locate and select the XML file you want to use.

3 Click Open.

Save an XML file as an InCopy story

You can save XML files as InCopy stories.

1 Open the XML file in InCopy.

2 Choose File > Save Content As.

3 Type the name and specify the location for the file.

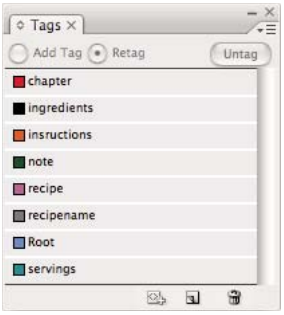
4 From the Save As Type menu (Windows®) or Save As menu (Mac OS®), choose InCopy Document, and click Save.

Tagging content for XML

Create and load XML tags

Before you tag page items, create (or load) tags to identify each content type or item in your document. You can create tags from scratch or load them from another source, such as an InDesign document, InCopy document, or DTD file. Use any of the following methods to create or load XML tags for your document:

- Create a tag with the New Tag command.
- Load tags from an XML file or another document.
- Import a DTD file.



The Tags panel with a list of available tags

See also

"About XML" on page 259

Create an XML tag

1 Choose Window > Tags to open the Tags panel.

2 Do one of the following:

- Choose New Tag from the Tags panel menu.
- Click the New Tag button on the Tags panel.

3 Type a name for the tag. The name must conform to XML standards. If you include a space or an illegal character in the tag name, an alert message appears.

4 Select a color for the tag if you created your tag from the Tags panel menu. (If you created your tag with the New Tag button, you can choose a color by changing the color of the tag.)

Note: *You can assign the same color to different tags. The color you select appears when you apply the tag to a frame and choose View > Structure > Show Tagged Frames, or when you apply the tag to text within a frame and choose View > Structure > Show Tag Markers. (Tag colors do not appear in exported XML files.)*

5 Click OK.

Load XML tags from another source

You can load tags from an XML file, an InDesign document, or an InCopy document.

Note: *InCopy automatically adds tags to the Tags panel when you load an XML file.*

1 Choose Load Tags from the Tags panel menu.

2 Select the file containing the tags you want to load into the Tags panel, and then click Open.

Change tag name or color

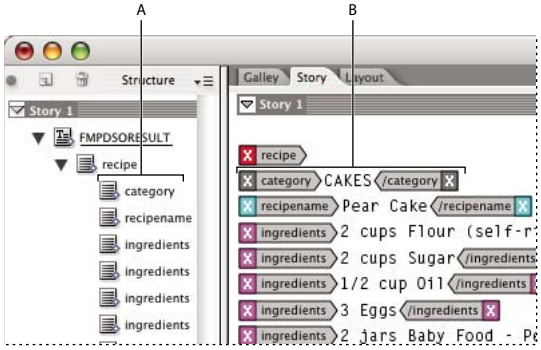
1 Double-click a tag name in the Tags panel or choose Tag Options in the Tags panel menu.

2 Change the name or the color of the tag, and click OK.

Note: *You cannot change the name of locked tags. InCopy automatically locks tags specified in a loaded DTD file. To change the name of these tags, you must edit the DTD file and reload it into the document.*

Tagging items

Before you export content to an XML file, you must tag the text and other items (such as frames and tables) that you want to export. You also need to tag items that you have created as placeholders for imported XML content. Items that have been tagged appear as elements in the Structure pane.



XML elements and tags
A. *Elements appear in the Structure pane.* ***B.*** *Tag markers surround text to which tags have been applied.*

When tagging page items, note the following:

- Text frames must be tagged before you can tag the text inside them.
- You can apply only one tag to a frame.
- Threaded text frames share a single tag, which applies to all text in the thread, including overset text.
- When you tag text within a tagged element (for example, when you tag a paragraph within a tagged story), the text appears as a child element of an existing element in the Structure pane.
- When you tag an element within a frame with the Autotag button, InCopy automatically tags the frame using the tag specified in the Tagging Preset Options dialog box.

Tag text within a text frame

1 Choose View > Layout View.

2 Make sure that the text frame in which the text appears is tagged. (If the frame isn't tagged when you try to tag text within the frame, InCopy tags the story using default tags.)

3 Do one of the following:

- Using the Type tool T, select text within a text frame, and then click a tag in the Tags panel. If you select all of the text within the frame, the tag is applied to the frame, not to the block of text (unless you've selected Add Tag in the Tags panel).
- Select the text frame, table, table cells, or image that you want to tag, and click the Autotag icon in the Tags panel to apply a default tag. (See "Specify Autotag defaults" on page 266.)
- Automatically tag text to which paragraph or character styles have been applied using the Map Styles To Tags command.

Tag text in tables

When you tag a table for export to XML, you create a table element as well as one cell element for each cell in the table. The cell elements are child elements of the table element and are created automatically.

1 Choose View > Layout View.

2 Click in the table and choose Table > Select > Table.

3 Select a tag for the table in the Tags panel.

InCopy creates a cell element for each cell in the table (you can display them in the Structure pane). The tag applied to table cell elements depends on your tagging present options.

4 If needed, tag table cells with a different tag.

For example, you can tag the first-row cells with a different tag to identify them as heading cells. To apply tags to cells, select the actual table cells in your document, and then select a tag. (Selecting cells in the table also selects the corresponding cell elements in the Structure pane.)

You can also tag a table by selecting it and then clicking the Autotag icon in the Tags panel. The `Table` *tag (or another tag of your choice) is applied immediately to the table, according to your Autotag default settings.*

Tag content according to styles

Paragraph, character, table, and cells styles you assign to text can be used as a means of tagging text for XML. For example, a paragraph style called Body can be associated with a tag called `StoryText`. Then, using the Map Styles To Tags command, you can apply the `StoryText` tag to all paragraphs in your document that are assigned the Body paragraph style. You can map more than one style to the same tag.

Important: *The Map Styles To Tags command tags content automatically, including paragraphs and characters that have been tagged already. To retain existing tags, apply tags manually.*

1 Choose Map Styles To Tags from the Tags panel menu or Structure pane menu.

2 For each style in your document, specify the tag that you want it to be mapped to.

Map Styles To Tags dialog box

3 To match style names to tag names, click Map By Name. Styles that are named identically to tag names are selected in the dialog box. Map By Name is case-sensitive; `Head1` and `head1`, for example, are treated as different tags.

4 To use style mappings set up in an InDesign file, click Load and select the file.

5 Select or deselect Include options:

Master Pages Stories Maps styles found on the master page to tags.

Pasteboard Stories Maps styles found on stories on the pasteboard to tags. (Deselect this option to keep stories on the pasteboard from being tagged.)

Empty Stories Maps styles located in empty stories to tags. (Deselect this option to keep styles on empty stories from being tagged.)

6 Click OK.

The new XML tags are applied throughout your document to paragraph, character, table, and cell styles that you specified in the Map Styles To Tags dialog box.

Untag a page item

Untag an item to remove its tag but retain the associated content.

1 Select the element in the Structure pane window, or select the page item in the document layout.

2 Do one of the following:

- Click Untag Element in the Structure pane menu.
- Click the Untag button in the Tags panel.

Retag a page item

Retag an item to replace the existing tag (you don't need to untag it first).

1 Select the Type tool T .

2 Do one of the following:

- Select the text or text frame, and then click a different tag in the Tags panel.
- Place the insertion point in a tagged text frame within a story element (not a child element). Select Retag at the top of the Tags panel, and click a different tag in the Tags panel.
- Select the entire block of text to which a tag has been applied, select Retag at the top of the Tags panel, and click a different tag. (If you select Add Tag at the top of the Tags panel, and then click a different tag, a new child element will appear in the Structure pane.)

Specify Autotag defaults

When you select a text frame, table, table cells, or an image, and then click the Autotag icon in the Tags panel, InCopy applies a default tag to the item you selected. You can specify these default tags in the Tagging Preset Options dialog box.

Note: *InCopy applies a default tag when you create an element that requires a parent element, but doesn't yet have one. For example, if you tag text within a text frame but the frame itself isn't tagged, InCopy assigns the frame a tag according to the Tagging Preset Options. The capability to apply default tags helps InCopy maintain correct XML structure.*

1 Choose Tagging Preset Options from the Tags panel menu.

2 Choose a default tag for text frames, tables, table cells, and images.

If the tag you need isn't listed, you can choose New Tag from the menu and create a tag.

Map XML tags to styles

XML tags are merely data descriptions; they carry no formatting instructions. As such, you need to format XML content after you import it and lay it out. One way to do that is to map XML tags to paragraph, character, table, or cell styles. For example, the `Byline` tag could be mapped to the Author character style, so that all imported and placed XML content that is tagged `Byline` is automatically assigned the Author character style. Mapping tags to styles makes formatting imported XML content easier and less time-consuming.

You don't need to map every tag to a paragraph or character style. Some elements may not appear in the layout and others may be easier to format one at a time. Moreover, child elements take on the paragraph or character style that is assigned to their parent, which can cause confusion unless you are careful to map parent and child elements separately.

Important: *The Map Tags To Styles command reapplies styles throughout a document, sometimes with unwanted results. When you map a tag to a style, text that was previously assigned to one style may be reassigned to another, depending on its XML tag. If you've already formatted some text, you might prefer to apply styles manually to prevent your paragraph and character style choices from being overridden.*

1 Choose Map Tags To Styles from the Tags panel menu or the Structure pane menu.

A menu of styles appears for each tag in the Map Tags To Styles dialog box

2 Do any of the following:

- To import styles, tags, and mapping definitions from another document, click Load, choose a document, and click Open.
- To map tags to styles individually, click the Style column adjacent to a tag, and choose a paragraph or character style from the menu that appears. (The paragraph symbol identifies paragraph styles in the menu; an "A" identifies character styles.) Repeat for each tag you want to map.
- To automatically map tags to styles with the same names, click Map By Name. Styles with names that are identical to tag names are selected in the Style column. To match, a tag and style must not only have the same name, but the same case; `H1` and `h1`, for example, are not considered a match. (If the same style name exists in two different style groups, Map By Name doesn't work and you are alerted to rename one of the styles.)

3 Click OK.

See also

"Add paragraph and character styles" on page 167

"Create and load XML tags" on page 262

Show or hide tagged frames or tag markers

In Galley and Story views, *tag markers* indicate where items on a page have been tagged. In Layout view, *tagged frames* indicate where items such as tables and images have been tagged. The tag color determines the color of the marker or frame.

In this example, all page items are tagged except for the subhead below the title.

❖ Do any of the following:

- To display tagged frames in color, choose View > Structure > Show Tagged Frames.
- To hide the color-coding of tagged frames, choose View > Structure > Hide Tagged Frames.
- To display color brackets around tagged text, choose View > Structure > Show Tag Markers.
- To hide color brackets around tagged text, choose View > Structure > Hide Tag Markers.

Delete tags or elements

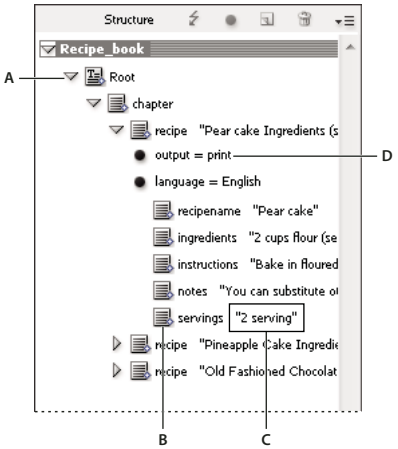
- To delete a tag from the Tags panel, drag it to the Delete Tag icon at the bottom of the panel. If the tag has been applied to content, an alert message appears. Select another tag to replace the deleted tag, and then click OK.
- To delete all unused tags, choose Select All Unused Tags from the Tags panel menu, and click the Delete Tag icon at the bottom of the panel.
- To delete an element from the Structure pane, select the element, and then click the Structure pane Delete icon or choose Delete from the Structure pane menu. If the element contains any content, an alert message appears. Click Untag to leave the content in the document; click Delete to delete both the element and its content.

Note: *Tags that were loaded with an imported DTD file cannot be deleted until the DTD file is deleted.*

Structuring documents for XML

Structure pane overview

The Structure pane displays, in hierarchical form, items in a document that have been marked with XML tags. These items are called *elements*. You can move elements in the Structure pane to define the order and hierarchy of items. An element consists of an icon indicating the element type and a tag name.



Structure pane
A. *Triangle to expand or collapse elements* ***B.*** *Element* ***C.*** *Text snippet* ***D.*** *Attribute*

Additionally, elements may provide this information:

Blue diamond A blue diamond on an element icon means that the element is attached to an item on the page; the absence of a blue diamond means that the element has not been attached to a page item.

Underline The tag name is underlined if the item on the page to which the element corresponds is selected. For example, if you select text to which you assigned the `Title` tag, the word *Title* in the text's element is underlined in the Structure pane. Underlining shows you whether selected items on the page and elements in the Structure pane correspond.

Text snippet The first 32 characters of tagged text, called a *text snippet,* can appear to the right of the element. These snippets help you identify the page item to which an element corresponds.

Dot and attribute Attributes provide metadata information about an element. If attributes are attached to an element, a black dot along with attribute names and values appear below the element.

Use the Structure pane

- To open the Structure pane, choose View > Structure > Show Structure.
- To close the Structure pane, choose View > Structure > Hide Structure, or click the splitter button.
- To expand or collapse an element (and display or hide any of its child elements), click the triangle next to the element.
- To adjust the size of the Structure pane, drag the splitter button.
- To expand or contract an element as well as all elements contained within it, hold down Ctrl (Windows) or Command (Mac OS) while clicking the triangle next to the element.
- To show or hide text snippets, choose Show Text Snippets or Hide Text Snippets from the Structure pane menu.

Structure pane icons

The following icons appear in the Structure pane:

Icon	Name	Use
	Root element	Each document includes one root element at the top, which can be renamed but cannot be moved or deleted.
	Story element	Represents tagged stories (one or more linked frames).
	Text element	Represents tagged text within a frame.
	Unplaced text element	Unplaced text element not yet associated with a page item.
	Unplaced graphic element	Unplaced graphic element not yet associated with a page item.
	Table element	Represents a table.
	Header cell element	Represents a cell in the header row of a table.
	Body cell element	Represents a cell within the body of a table.
	Footer cell element	Represents a cell in the footer row of a table.
	Empty element	An empty frame is associated with this element.
	Attribute	Includes metadata, such as keywords or location of a linked image (HREF attribute).
	Comment	Includes comments that appear in the XML file, but not the InDesign document.
	Processing instruction	Includes an instruction that triggers an action in applications that can read processing instructions.
	DOCTYPE element	Tells InDesign which DTD file to use when validating the XML file.

Rearrange structured elements

You can change the order and hierarchical rank of elements in the Structure pane. However, observe these rules:

- Changes to the XML hierarchy structure may affect the appearance of tagged items on InCopy pages. For example, making a text element the child of an element elsewhere in the structure also moves the text in the layout.
- You cannot drag a table cell element into a table element or move elements into a table element.

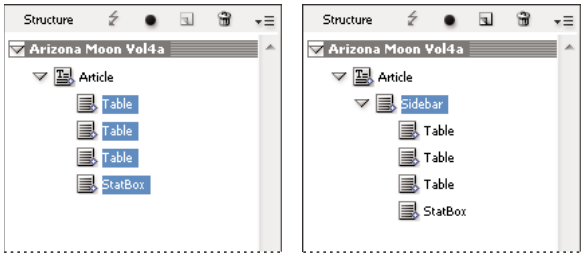
❖ In the Structure pane, do one of the following:

- To move an element, drag it to a new location within the structure. A line appears when you drag to indicate where you are inserting the element. The width of the line marks the level within the hierarchy.
- To make an element a child of another element, either position it over the parent element to highlight it or place it amongst the parent's other child elements, and then release the mouse button.
- To demote an element by one level in the hierarchy, drag it just above another parent element and move it to the left slightly until the line indicating its placement spans the width of the parent element.
- To copy or cut an element, select the element or elements in the Structure pane, and then choose Edit > Copy or Edit > Cut. Select the element directly above where you want to insert the element, and choose Edit > Paste.

Note: *When you cut an element, the element and contents are cut to the clipboard, but the frame remains intact.*

Insert a parent element

Insert a parent element in the Structure pane to maintain the proper XML structure or organize content better. Before you can insert a new parent element, you must select the elements that will be the children of the new parent. When the new parent element is inserted, the selected child elements are demoted by one rank in the structural hierarchy.



With child elements selected (left); a newly inserted parent element includes the child elements (right).

1 In the Structure pane, select the elements that will be child elements to the new parent element you want to insert. Note the following:
   - You can't select the Story or a story-level element.
   - The elements must be on the same level of the structural hierarchy.
   - The elements must be contiguous.
   - The selection must not include table cells or attributes.
2 On the Structure pane menu, choose New Parent Element, or right-click (Windows) or Control-click (Mac OS) and choose New Parent Element.
3 Select a tag for the new parent element and click OK.

Insert a new parent element quickly by selecting Add Tag in the Tags panel and then clicking a tag in the panel. You can also right-click (Windows) or Control-click (Mac OS) an element you selected in the Structure pane, choose New Parent Element, and then choose an element.

Work with attributes

An *attribute* provides additional information about an XML element. Each attribute consists of a name and a value. Attributes appear in the Structure pane; they are not placed in the document or used as content in the document. Include attributes with elements for the benefit of files and applications that will use the XML files you create in InCopy .

You can add attributes to any element except the DOCTYPE element (a DTD file), comments, and processing instructions. For example, to include keywords for searching in a downstream application, you can create an attribute called *keywords*. You could also create attributes to indicate substituted text, track article titles, and record other content-related information.

If you are using a DTD file, view its contents to see which attributes it allows. Attribute names, like tag names, must conform to the DTD.

Note: *InCopy recognizes special namespace attributes that can specify paragraph or character styles, tables and table cell styles, as well as control whitespace. For more information, see the XML technical reference and other resources at www.adobe.com/go/learn_id_XMLscript.*

See also

"Exporting to XML" on page 276

Add an attribute

1 Select an element.

2 Do one of the following:

- Click the Add An Attribute button .
- Choose New Attribute on the Structure pane menu.
- Right-click (Windows) or Control-click (Mac OS) the selected element and choose New Attribute.

3 Specify a name and a value for the attribute, and then click OK.

Show or hide attributes in the Structure pane

❖ Choose Show Attributes or Hide Attributes from the Structure pane menu.

You may need to click the triangle icon next to an element to display its attributes.

Edit or delete an attribute

1 Select an attribute in the Structure pane.

2 Do one of the following:

- To edit the attribute, double-click it or choose Edit from the Structure pane menu.
- To delete the attribute, click the Delete icon or choose Delete from the Structure pane menu.

Edit href attributes

InCopy creates `href` attributes automatically to handle image files. The `href` attribute defines the on-disk location of the image file so that the image file can be displayed. When you tag a placed image, InCopy creates an `href` attribute value that lists the image's path and filename.

The path can be an absolute link, a relative link to the same folder as the XML file, or a relative link to the Images subfolder of the folder where the XML file is located. Relative paths are specific to the path where the document is saved.

- An `href` attribute with an absolute link looks like the following (in Windows and the Mac OS):

  ```
  href=file:///C:/Images/Meadow.psd
  ```

  ```
  href=file:///Users/abhayc//Desktop/abc.jpg
  ```

- An *href* attribute to an image file in the same folder as the XML file looks like the following:

  ```
  href=file:Meadow.psd
  ```

- An *href* attribute to an image file in the Images subfolder looks like the following:

  ```
  href=file:///Images/Meadow.psd
  ```

You can edit the `href` attribute to specify a new link to an image. For example, you can edit an absolute link to make it a relative link, thereby making the image file accessible when you export the file.

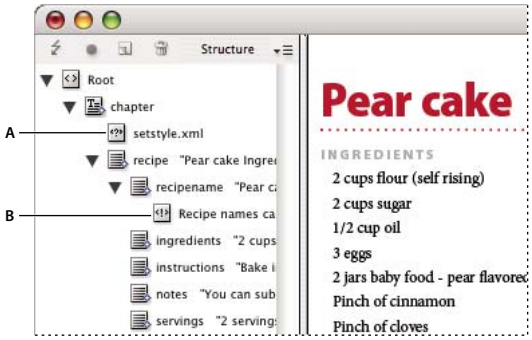
1 In the Structure pane, double-click the *href* attribute. (You may need to click the triangle icon next to the image element to display the attribute.)

2 For Value, enter the new path to the image, and then click OK.

Add comments and processing instructions

Using InCopy , you can include comments and processing instructions in an XML file. Enter a comment to include descriptive information about an element. Comments can be viewed in web browsers and text editors. They help others understand XML structure and XML tags. A processing instruction is a special, application-specific command. For example, you can enter a page-break processing instruction so that an application to which you export your XML file understands where to enter a page break. InCopy user-created processing instructions are meant for use in other programs; InCopy itself does not act on processing instructions.

Comments and processing instructions appear in the Structure pane. You can move, edit, and delete comments and processing instructions as you can other elements in the Structure pane. They cannot, however, contain child elements or attributes.



InDesign Structure pane with text snippets showing
A. *Processing instruction* ***B.*** *Comment*

See also

"Rearrange structured elements" on page 270

Add a comment

1 Select the element about which you will comment.

Note: *To add a comment to a table, select a table cell element. You can add comments to table cells, not tables.*

2 Choose New Comment in the Structure pane menu.

3 Type the comment in the New Comment dialog box.

Add a processing instruction

1 Select an element for the processing instruction.

Note: *To add a processing instruction to a table, select a table cell element. You can add processing instructions to table cells, not tables.*

2 Choose New Processing Instruction in the Structure pane menu.

3 For Target, enter a name that identifies the processing instruction to an application that reads exported XML files.

4 For Data, enter a value that tells the application what to do with the processing instruction.

View comments and processing instructions

❖ Choose Show Comments or Show Processing Instructions in the Structure pane menu.

Edit comments and processing instructions

1 Select the comment or processing instruction.

2 Do any of the following:

- Double-click the comment or processing instruction.
- Choose Edit on the Structure pane menu.

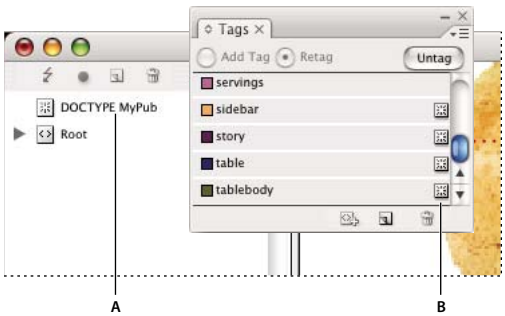
3 Edit the comment or processing instruction and click OK.

Use DTD files to validate XML

Validating the XML in a document means to compare the structure, element tag names, and attributes against the specifications of a DTD file. To validate against a DTD file, you must first load it into your document in InDesign.

Note: *Loading a DTD file imports tag names into the Tags panel. These imported tag names are locked; they can't be deleted or renamed except by deleting the DTD file from the document.*

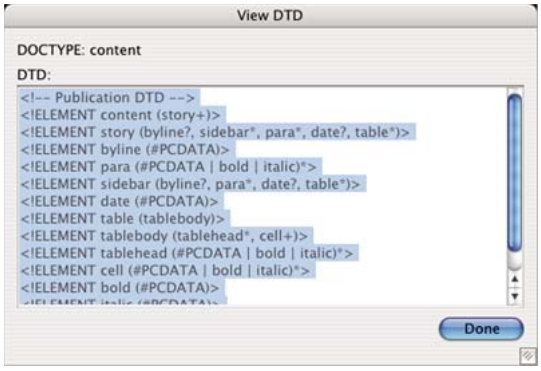
The DOCTYPE element appears at the top of the Structure pane if a DTD file has been loaded into your document. (DTDs are sometimes loaded automatically when you import an XML file.) To replace the DTD file in a document, delete the existing DTD and then load a new one.



Working with DTD files in InDesign
A. *DOCTYPE element from the DTD file (Structure pane)* ***B.*** *Locked tag from the DTD file (Tags panel)*

View a DTD file

DTDs are written in ASCII text. They may contain embedded instructions and explanations that describe how to apply tags and order elements correctly. In InDesign, you can only view a DTD that is loaded in a document.



DTD file opened for viewing

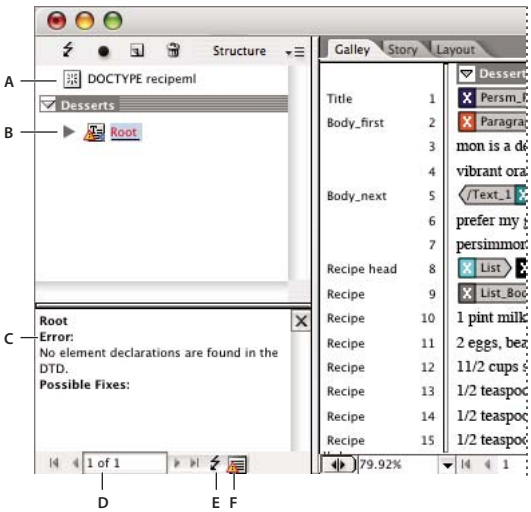
❖ Do one of the following:

- In the Structure pane menu, choose View DTD.
- Double-click the DOCTYPE element in the Structure pane.

To print a DTD file, copy code from the View DTD window and paste it in a text editor.

Validate XML structure

When you validate your document, InCopy alerts you if the XML deviates from rules established by the DTD file. It suggests ways to make the XML meet DTD file requirements. You can fix errors one at a time or view all errors in a separate window.



Structure pane with Suggestions section
A. *DOCTYPE element from assigned DTD file* ***B.*** *Error or invalidating condition* ***C.*** *Description of error with suggested fixes* ***D.*** *Error count* ***E.*** *Validate button* ***F.*** *View all errors at once in a separate window*

1 Choose View > Structure > Show Structure.

2 In the Structure pane, click the Validate button ⚡.

To change the root element from which InDesign validates, choose DTD Options in the Structure pane menu.

3 To fix errors displayed in the Suggestion pane, either click a suggested fix to try it, or edit the XML structure and tags directly using the Structure pane and the Tags panel.

4 To view other errors, do one of the following:

- Click the Left arrow ◂ or Right arrow ▸.
- Click the Error Window button to view all errors in a separate window.
- Choose View List Of Errors on the Structure pane menu.

Note: *InCopy stops validating after detecting 250 errors. A plus sign in the Error Count box appears when this limit is reached.*

Exporting to XML

Export an InCopy file to XML

Before you can convert InCopy stories to XML data, you must have done the following:

- Created or loaded element tags.
- Applied tags to items in stories.
- Rearranged elements in the Structure pane, if needed.

You can export all or a portion of the XML content in your document. Only content that is tagged can be exported.

1 If you intend to export only a portion of the document, select the element in the Structure pane where you want exporting to begin.

2 Choose File > Export.

3 Choose XML for Save As Type (Windows) or Format (Mac OS).

4 Type the name and specify the location of the XML file, and then click Save.

5 In the Export XML dialog box, select the desired encoding scheme: UTF-8 or UTF-16.

6 Click Export to export the XML file.

See also

"Tagging items" on page 264

Export tags only

1 Choose Save Tags from the Tags panel menu.

2 Type a name and specify a location for the file.

3 For Encoding, select UTF-8, UTF-16, or Shift-JIS (for Japanese characters), and then click Save. InCopy saves the tags as an XML file.

Chapter 12: Keyboard shortcuts

Adobe® InCopy® provides shortcuts to help you quickly work in documents. Many keyboard shortcuts appear next to the command names in menus. You can use the default InCopy shortcut set, a Microsoft® Word shortcut set, or a shortcut set that you create.

You can generate a list of the current keyboard set by choosing Show Set in the Keyboard Shortcuts dialog box. This option is especially useful for printing a copy of your custom shortcuts.

Default keyboard shortcuts

Keys for tools

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Windows®	Mac OS®
Switch between Text tool and Note tool	Shift+Esc	Shift+Esc
Temporarily switch from Text tool to Note Tool	Alt+Shift	Option+Shift
Temporarily switch to Hand tool (Layout view)	Alt+spacebar	Option+spacebar
Temporarily switch to Zoom tool (Layout view)	Ctrl+spacebar	Command+spacebar
Temporarily switch to Zoom In tool (Layout view)	Ctrl+spacebar	Command+spacebar
Temporarily switch to Zoom Out tool (Layout view)	Ctrl+Alt+spacebar	Command+Option+spacebar

See also

"Use keyboard shortcut sets" on page 19

Keys for navigating through documents

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Windows	Mac OS
Go to first/last page (Layout view)	Ctrl+Shift+Page Up/ Page Down	Command+Shift+Page Up/Page Down
Go to previous/next page (Layout view)	Shift+Page Up/Page Down	Shift+Page Up/Page Down
Move right/left one character	Right Arrow/Left Arrow	Right Arrow/Left Arrow
Move up/down one line	Up Arrow/Down Arrow	Up Arrow/Down Arrow

Result	Windows	Mac OS
Move right/left one word	Ctrl+Right Arrow/Left Arrow	Command+Right Arrow/ Left Arrow
Go to beginning of sentence forward/backward (Galley and Story views)	Ctrl+]/[	Command+]/[
Go to beginning/end of line	Home/End	Home/End
Go to previous/next paragraph	Ctrl+Up Arrow/Down Arrow	Command+Up Arrow/Down Arrow
Go to next story (Galley view)	Ctrl+Alt+]	Command+Option+]
Go to previous story (Galley view)	Ctrl+Alt+[	Command+Option+[
Go to beginning/end of story	Ctrl+Home/End	Command+Home/ End
Select one character to the right/left	Shift+Right Arrow/Left Arrow	Shift+Right Arrow/Left Arrow
Select one word to the right/left	Ctrl+Shift+Right Arrow/Left Arrow	Command+Shift+Right Arrow/Left Arrow
Select to the start/end of the line	Shift+Home/End	Shift+Home/End
Select current paragraph (Galley and Story views)	Ctrl+Shift+P	Command+Shift+P
Select sentence forward/backward (Galley and Story views)	Ctrl+Alt+Shift+Right Arrow/Left Arrow	Command+Option+Shift +Right Arrow/Left Arrow
Select one line above/below	Shift+Up Arrow/Down Arrow	Shift+Up Arrow/Down Arrow
Select one paragraph before/after	Ctrl+Shift+Up Arrow/ Down Arrow	Command+Shift+Up Arrow/Down Arrow
Select to beginning/end of story	Ctrl+Shift+Home/End	Command+Shift+Home/End
Delete word in front of insertion point (Galley and Story views)	Ctrl+Backspace or Delete	Command+Delete or Del (numeric keypad)
Delete current sentence (Galley and Story views)	Ctrl+Shift+Backspace or Delete	Command+Shift+Delete
Delete current paragraph (Galley and Story views)	Ctrl+Alt+Shift+Delete	Command+Option+Shift +Del on number pad
Recompose all stories	Ctrl+Alt+/	Command+Option+/
Toggle current and previous view	Ctrl+Alt+2	Command+Option+2
Go to Next window	Ctrl+F6	Command+F6
Go to Previous window	Ctrl+Shift+F6	Command+Shift+F6
Scroll up/down one screen	Page Up/Page Down	Page Up/Page Down
Go to first/last spread	Alt+Shift+Page Up/ Page Down	Option+Shift+Page Up/ Page Down
Go to first previous/ next spread	Ctrl+Alt+Page Up/Page Down	Command+Alt+Page Up/Page Down
Fit selection in window	Ctrl+Alt+=	Command+Option+=
Increase screen to 50%/ 200%/400%	Ctrl+5/2/4	Command+5/2/4
Access view percent field	Ctrl+Alt+5	Command+Option+5

See also

"Use keyboard shortcut sets" on page 19

Keys for moving and transforming graphics

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Windows	Mac OS
Increase/Decrease size/scale by 1%	Ctrl+. [period] or, [comma]	Command+. [period] or, [comma]
Increase/Decrease size/scale by 5%	Ctrl+Alt+. [period] or, [comma]	Command+Option+. [period or, [comma]
Move selection*	Left Arrow, Right Arrow, Up Arrow, Down Arrow key	Left Arrow, Right Arrow, Up Arrow, Down Arrow
Move selection by 1/10th*	Ctrl+Shift+ Left Arrow, Right Arrow, Up Arrow, Down Arrow	Command+Shift+Left Arrow, Right Arrow, Up Arrow, Down Arrow
Move selection by 10 times*	Shift+Left Arrow, Right Arrow, Up Arrow, Down Arrow	Shift+Left Arrow, Right Arrow, Up Arrow, Down Arrow
*Amount is set in Edit > Preferences > Units & Increments (Windows) or Adobe InCopy > Preferences > Units & Increments (Mac OS).		

See also

"Use keyboard shortcut sets" on page 19

Keys for working with text

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Windows	Mac OS
Enables the Position tool in text	Esc	Esc
Normal horizontal scale	Ctrl+Shift+X	Command+Shift+X
Normal vertical scale	Ctrl+Alt+Shift+X	Command+Option+Shift+X
Increase/Decrease text point size	Ctrl+Shift+>/<	Command+Shift+>/<
Increase/Decrease text point size five times	Ctrl+Alt+Shift+>/<	Command+Option+Shift+ >/<
Increase/Decrease leading (horizontal text)	Alt+Up Arrow/Down Arrow	Option+Up Arrow/ Down Arrow
Increase/Decrease leading five times (horizontal text)	Ctrl+Alt+Up Arrow/Down Arrow	Command+Option+Up Arrow/Down Arrow
Auto leading	Ctrl+Alt+Shift+A	Command+Option+Shift+ A
Increase/Decrease kerning/tracking	Alt+Right Arrow/Left Arrow	Option+Right Arrow/Left Arrow
Increase/Decrease kerning/tracking five times	Ctrl+Alt+Right Arrow/Left Arrow	Command+Option+Right Arrow/Left Arrow
Reset all manual kerning preferences (reset track to 0)	Ctrl+Alt+Q	Command+Option+Q
Increase/Decrease baseline shift (horizontal text)	Alt+Shift+Up Arrow/Down Arrow	Option+Shift+Up Arrow/Down Arrow
Increase/Decrease baseline shift five times (horizontal text)	Ctrl+Alt+Shift+Up Arrow/Down Arrow	Command+Option+Shift+Up Arrow/Down Arrow
Increase/Decrease word space kerning	Ctrl+Alt+\ or Backspace	Command+Option+\ or Delete

Result	Windows	Mac OS
Increase/Decrease word space kerning five times	Ctrl+Alt+Shift+\ or Backspace	Command+Option+Shift +\ or Delete
Align text left/center/right	Ctrl+Shift+L/C/R	Command+Shift+L/C/R
Justify with last line aligned left	Ctrl+Shift+J	Command+Shift+J
Justify all lines	Ctrl+Shift+F	Command+Shift+F
Insert right indent tab	Shift+Tab	Shift+Tab
Update missing font list	Ctrl+Alt+Shift+/	Command+Option+Shift+/
Toggle typographer's quotes preference	Ctrl+Alt+Shift+'	Command+Option+Shift+'
Expand/Collapse all notes except current note	Alt+click expanded/collapsed note bookend	Option+click expanded/collapsed note bookend

See also

"Use keyboard shortcut sets" on page 19

Keys for working with type

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Windows	Mac OS
Open Justification dialog box	Ctrl+Alt+Shift+J	Command+Option+Shift+J
Open Keep Options dialog box	Ctrl+Alt+K	Command+Option+K
Open Paragraph Rules dialog box	Ctrl+Alt+J	Command+Option+J
Redefine character style	Ctrl+Alt+Shift+C	Command+Option+Shift+C
Open Drop Caps and Nested Styles dialog box	Ctrl+Alt+R	Command+Option+R
Redefine paragraph style	Ctrl+Alt+Shift+R	Command+Option+Shift+R
Toggle all caps (on/off)	Ctrl+Shift+K	Command+Shift+K
Toggle small caps (on/off)	Ctrl+Alt+L	Command+Option+H
Superscript	Ctrl+Shift+=	Command+Shift+=
Subscript	Ctrl+Alt+Shift+=	Command+Option+Shift+=
Underline	Ctrl+Shift+U	Command+Shift+U
Strikethrough	Ctrl+Shift+/	Control+Command+Shift+/
Bold	Ctrl+B, Ctrl+Shift+B	Command+B, Command+Shift+B
Italic	Ctrl+Shift+I	Command+Shift+I
Normal	Ctrl+Shift+Y	Command+Shift+Y
Toggle align to grid (on/off)	Ctrl+Alt+Shift+G	Command+Option+Shift+G
Toggle auto-hyphenate (on/off)	Ctrl+Alt+Shift+H	Command+Option+Shift+H

See also

"Use keyboard shortcut sets" on page 19

Keys for finding and changing text

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Windows	Mac OS
Insert selected text into Find What box	Ctrl+F1	Command+F1
Insert selected text into Find What box and find next	Shift+F1	Shift+F1
Replace selected text with Change To text	Ctrl+F3	Command+F3
Replace selected text with Change To text and find next	Shift+F3	Shift+F3
Insert selected text into Replace box	Ctrl+F2	Command+F2

See also

"Use keyboard shortcut sets" on page 19

Keys for tables

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Windows	Mac OS
Clear cell	Backspace or Delete	Delete
Move to next cell	Tab, Left Arrow, or Right Arrow	Tab, Left Arrow, or Right Arrow
Move to previous cell	Shift+Tab	Shift+Tab
Move up/down through table cells	Up Arrow/Down Arrow	Up Arrow/Down Arrow
Move to first/last cell in column	Alt+Page Up/Page Down	Option+Page Up/Page Down
Move to first/last cell in row	Alt+Home/End	Option+Home/End
Move to first/last row in frame	Page Up/Page Down	Page Up/Page Down
Select cells above/below	Shift+Up Arrow/Down Arrow	Shift+Up Arrow/Down Arrow
Select cells to the right/left	Shift+Right Arrow/Left Arrow	Shift+Right Arrow/Left Arrow
Start row on next column	Enter (numeric keypad)	Enter (numeric keypad)
Start row on next frame	Shift+Enter (numeric keypad)	Shift+Enter (numeric keypad)

See also

"Use keyboard shortcut sets" on page 19

Keys for type panels and dialog boxes

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Windows	Mac OS
Open Justification dialog box	Alt+Ctrl+Shift+J	Option+Command+Shift+J
Open Paragraph Rules dialog box	Alt+Ctrl+J	Option+Command+J
Open Keep Options dialog box	Alt+Ctrl+K	Option+Command+K
Activate Character panel	Ctrl+T	Command+T
Activate Paragraph panel	Ctrl+Alt+T	Command+Option+T

See also

"Use keyboard shortcut sets" on page 19

Keys for the character and paragraph styles

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Windows	Mac OS
Make character style definition match text	Select text and press Shift+Alt+Ctrl+C	Select text and press Shift+Option+Command+C
Make paragraph style definition match text	Select text and press Shift+Alt+Ctrl+R	Select text and press Shift+Option+Command+R
Change options without applying style	Shift+Alt+Ctrl-double-click style	Shift+Option+Command-double-click style
Remove style and local formatting	Alt-click paragraph style name	Option-click paragraph style name
Clear overrides from paragraph style	Alt+Shift-click paragraph style name	Option+Shift-click paragraph style name
Show/hide Paragraph and Character Styles panels, respectively	F11, Shift+F11	Command+F11, Command+Shift+F11

See also

"Use keyboard shortcut sets" on page 19

Keys for the Thesaurus

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Windows	Mac OS
Load word	Ctrl+Shift+5	Command+Shift+5
Look up word	Ctrl+Shift+6	Command+Shift+6
Change word	Ctrl+Shift+7	Command+Shift+7

See also

"Use keyboard shortcut sets" on page 19

Keys for working with XML

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Windows	Mac OS
Expand/Collapse element	Right Arrow/Left Arrow	Right Arrow/Left Arrow
Expand/Collapse element and child elements	Alt+Right Arrow/Left Arrow	Option+Right Arrow/Left Arrow
Extend XML selection up/down	Shift+Up Arrow/Down Arrow	Shift+Up Arrow/Down Arrow
Move XML selection up/down	Up Arrow/Down Arrow	Up Arrow/Down Arrow
Scroll structure pane up/down one screen	Page Up/Page Down	Page Up/Page Down
Select first/last XML node	Home/End	Home/End
Extend selection to first/last XML node	Shift+Home/End	Shift+Home/End
Go to previous/next validation error	Ctrl+Left Arrow/Right Arrow	Command+Left Arrow/Right Arrow
Automatically tag text frames and tables	Ctrl+Alt+Shift+F7	Command+Option+Shift+F7

See also

"Use keyboard shortcut sets" on page 19

Other useful keyboard shortcuts

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Windows	Mac OS
Close current document	Ctrl+Shift+W	Command+Shift+W
Close all documents	Ctrl+Alt+Shift+W	Command+Option+Shift+W
Save all documents	Ctrl+Alt+Shift+S	Command+Option+Shift+S
Expand all stories	Ctrl+Alt+Z	Command+Option+Z
Collapse all stories	Ctrl+Alt+Shift+Z	Command+Option+Shift+Z
Show/Hide all toolbars and panels	Ctrl+Alt+Tab	Command+Tab (Conflicts with Mac OS)
New default document	Ctrl+Alt+N	Command+Option+N
Display Links panel	Ctrl+Shift+D	Command+Shift+D
Activate last-used field in panel	Ctrl+Alt+` [accent grave]	Command+Option+` [accent grave]
Update beginning to cursor info	Ctrl+Alt+Shift+6	Command+Option+Shift+6
Update copyfit progress info	Ctrl+Alt+Shift+8	Command+Option+Shift+8
Update cursor to end info	Ctrl+Alt+Shift+7	Command+Option+Shift+7
Update selection info	Ctrl+Alt+Shift+5	Command+Option+Shift+5
Update whole story info	Ctrl+Alt+Shift+4	Command+Option+Shift+4
Force redraw	Shift+F5	Shift+F5

Result	Windows	Mac OS
Toggle units	Ctrl+Alt+Shift+U	Command+Option+Shift+U
New text macro	Ctrl+Alt+F8	Command+Option+F8
Edit text macro	Ctrl+Alt+Shift+F8	Command+Option+Shift+F8
Insert macro text	Alt+Shift+F8	Option+Shift+F8

See also

"Use keyboard shortcut sets" on page 19

Keys for resolving conflicts between Mac OS 10.3x and 10.4

This table isn't a complete list of keyboard shortcuts. It lists only those shortcuts that aren't displayed in menu commands or tool tips.

Result	Mac OS
Open Preferences dialog box	Command+K
Open Paragraph Styles panel	Command+F11
Open Character Styles panel	Command+Shift+F11
Open Text Macros panel	Control+Command+Shift+F10
Open Swatches panel	F5
Show/Hide toolbox	Control+Command+F12
Minimize application window	Command+M
Hide application	Command+H

See also

"Use keyboard shortcut sets" on page 19

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