

Migrating to InDesign for Advertising Agencies

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Introduction

For advertising agencies, deciding to make the switch from QuarkXPress to Adobe® InDesign® involves comparing features; determining the impact of the change on your workflow, employees, clients, and providers; and calculating the return on investment. Determining whether it makes good business sense to change your page layout program is a task in itself; however, the real work begins after you decide to make the switch to InDesign. That's also the point when the excitement of upgrading a critical component of your workflow is tempered by the apprehension that accompanies any change.

Fortunately, switching from QuarkXPress to InDesign does not have to be complicated nor difficult. Companies that decide to switch can be reassured that many other companies have already made the switch and a wealth of information and resources is available to help make the transition smoothly and quickly.

The three sections in this document provide a road map for advertising agencies that are migrating to InDesign. Each section includes information and suggestions to help you integrate InDesign into your workflow, as well as links to helpful websites and pointers to additional information.

- Section 1, “Lay the Groundwork,” offers suggestions about how to prepare for the switch.
- Section 2, “Make the Transition,” is essentially a five-step transition plan. Each step is a milestone on the path to becoming an InDesign site.
- Section 3, “Follow Up and Fine-tune,” explains how to evaluate the transition and move forward after switching to InDesign.

No two ad agencies are identical. You may decide to combine or skip some of the steps described in this document and create a more streamlined plan, or you might want to add more steps if doing so makes sense for your site. Regardless of the path you take, you'll find that you can switch to InDesign with minimal disruption. Not only can you make the switch quickly and seamlessly, but the addition of InDesign to your suite of publishing applications will enable you to streamline your workflow and increase overall productivity.

Note: Pfeiffer Consulting (www.pfeifferreport.com), an independent benchmarking and consulting services firm, offers several free reports about InDesign and the Adobe Creative Suite. “Adobe InDesign CS: ROI and Migration Strategies” (www.pfeifferreport.com/InDesignCS_ROI.pdf) analyzes the return on investment and productivity benefits of InDesign CS and the Adobe Creative Suite. “The Adobe InDesign CS Productivity Benchmark” (www.pfeifferreport.com/InDesignCS_prod.pdf) compares the productivity benefits of InDesign CS versus QuarkXPress.

Lay the Groundwork

Before you begin formulating a transition plan, you should gather as much information as you can about the impact that switching to InDesign will have across your company. Gathering information will involve evaluating your staff, current workflow, hardware, and software. You may also want to look beyond your own company for input.

Gather success stories

You probably wouldn't embark on a journey without first gathering some information about what you're likely to encounter along the way. Similarly, you might want to prepare for the transition to InDesign by talking to professional colleagues at other companies who have already migrated from QuarkXPress to InDesign, especially those at companies that produce similar publications and have workflows that are similar to yours.

Since InDesign 1.0 was released in 1999, many publishing sites around the world have successfully replaced QuarkXPress with InDesign. The more you know about how others have made the transition, the better prepared you'll be for your own successful transition.

Here are some questions you might want to ask:

- What recommendations do you have for a site that's planning to switch from QuarkXPress to InDesign?
- How did you prepare for the transition?
- How did you train your InDesign users?
- What challenges did you encounter during the transition?
- What issues did you have with clients, vendors, and print service providers?
- Did you encounter any unanticipated issues during the transition?
- What resources were most helpful during the transition?
- In retrospect, what would you do differently?

Many InDesign customer success stories are available on the Adobe website, explaining how leading companies have made the transition to InDesign and how they benefitted. Business categories include: corporate design, cross media, government, marketing and advertising agencies, magazine publishing, book publishing, newspapers, training/service providers, and education. To download PDF documents and QuickTime movies, go to the Adobe InDesign - Customer Stories web page at www.adobe.com/products/indesign/customerstories.html.

Evaluate your team and dependencies

The speed and ease of your transition to InDesign will depend in part on the makeup of your staff. Before you begin your migration, determine where your strengths are and take advantage of them. Some people are comfortable with change and eager to stay current with the latest technologies. Such employees are prime candidates to be early adopters. They're the ones who can lead the way and provide assistance and reassurance to others who may be less enthusiastic about change.

If you have employees who are apprehensive about changing page layout programs, arrange for them to attend an InDesign seminar or demonstration so they can learn about the powerful InDesign feature set and the advantages the program offers over QuarkXPress. In these environments, employees can freely ask questions about InDesign. If their first introduction is a training session, they may feel as though they're being forced into a change without knowing why or what the benefits are. For information about upcoming Adobe events and seminars, go to the Events of Interest page at the Adobe website (www.adobe.com/events/main.jsp). This page includes search options to help you find events for specific Adobe software products, including InDesign.

Evaluating the skill set of your current employees will help you determine how best to prepare them for the switch to InDesign. Experienced QuarkXPress users will find that many of the page layout skills they've acquired are directly transferable to InDesign, and it won't take them long to become comfortable and productive. Perhaps the biggest challenge for new InDesign users is learning to take advantage of all the features that aren't available in QuarkXPress, such as transparency, object styles, and full support of OpenType fonts. On the other hand, QuarkXPress

Migrating to Adobe Creative Suite 2

This paper focuses on how to migrate from QuarkXPress to InDesign CS2. However, many sites that make the switch will use InDesign as part of Adobe Creative Suite 2, which includes Adobe Photoshop® CS2, Adobe Illustrator® CS2, Adobe GoLive® CS2, and Adobe Acrobat® 7 Professional, as well as several productivity tools and integration features. In addition to taking advantage of many InDesign features that aren't available in QuarkXPress, advertising agencies that use Adobe Creative Suite 2 can further streamline their workflow and become even more productive. To learn more about the components of Adobe Creative Suite 2 and their benefits, see Appendix A on page 14.

users who are familiar with other Adobe graphics applications, like Photoshop and Illustrator, will already be familiar with many of these features. They also know the tight integration among Adobe products, such as a common user interface, support for native file formats, and support for import and export of PDF files.

Evaluate your current workflow

In addition to its enhanced creative tools, InDesign offers significant workflow refinements for advertising agencies making the move from QuarkXPress. Because InDesign was created to work seamlessly with other Adobe graphics applications, it's the ideal page layout tool for sites that use Photoshop, Illustrator, GoLive, or Acrobat. You can import native Photoshop and Illustrator artwork directly into InDesign layouts, including files with transparency effects, which means you don't have to save two versions of your graphic files—one for placement into your page layout program and another native file in case you need to make changes. This import feature reduces file management overhead and saves hard disk storage space. You can also export InDesign layouts as PDF files for distribution to colleagues, clients, and vendors for electronic review or output. If you repurpose the content in your print layouts in web pages, you can use the Package for GoLive command in InDesign to streamline the transition from print to web.

You also need to determine the impact that switching to InDesign will have on your clients and print service providers. Get in touch with your clients and printers and let them know of your intention to change page layout programs. Ask them about their experience with and support of InDesign. Will you have to supply finished files to clients or providers who don't use or support InDesign? Will you have to submit files to "old-fashioned" publications that don't accept native InDesign files? Do you exchange page layout files and other assets with subsidiary offices? One possible solution is to provide PDF files or PDF/X files instead of native InDesign files. The PDF/X format is quickly becoming a standard for delivering ads and other final documents that require high-resolution print output. Clients can use the free Adobe Reader® 7 application to add comments and text edits in e-mail based reviews, and print service providers can use Acrobat to preflight and print PDF and PDF/X documents. While not every print service provider supports native InDesign files, many do and the number is growing.

If you need to find a service provider that has experience handling InDesign files, you can perform a search at the Partner Finder page on the Adobe website (partners.adobe.com/public/partnerfinder/psp/show_find.do).

In addition to information about print service providers, the Adobe website also offers extensive information about variable data publishing (VDP), which automates the creation of customized materials by merging variable data from a database and digital assets with InDesign page layout templates. To learn more about how Adobe supports VDP, go to the Variable Data Publishing Resource Center web page at www.adobe.com/products/vdp/main.html. For a directory of VDP solutions providers, go to www.adobe.com/products/vdp/partners.html.

While InDesign includes most of the features available in QuarkXPress, some sites that use QuarkXPress rely on functionality provided by third-party XTensions software. When you evaluate your current workflow, you should determine if you're using any XTensions. Many of the features provided by XTensions are available in InDesign, saving you money and offering additional software stability. For example, QuarkXPress users must rely on third-party XTensions to link layouts to information in databases; however, this functionality is provided within InDesign by the Data Merge palette. If your current workflow relies on XTensions and the features provided by these XTensions are not available in the off-the-shelf version of InDesign, find out if the features are available in plug-ins for InDesign. Many third-party developers offer solutions for both programs. Other vendors offer InDesign-specific solutions that, in many cases, provide functionality well beyond comparable XTensions available for QuarkXPress. For information about InDesign plug-ins, visit the Third-party Plug-ins for InDesign page on the Adobe website (www.adobe.com/products/plugins/indesign/main.html).

If your workflow requires specialized functionality that isn't available in InDesign nor from commercial plug-ins, another possible solution is a custom script. InDesign is highly scriptable, so it can be tailored to meet a wide variety of specialized publishing needs. Every InDesign task you can perform manually can be performed automatically with a script. Scripts can even do things that can't be done manually. Many free scripts are available at the Adobe Studio Exchange (share.studio.adobe.com).

Determine hardware and software requirements

Before you install InDesign and begin to use it at your site, you should evaluate your current hardware and operating system software and determine if upgrades to either or both are necessary. (For example, InDesign CS2, as well as the entire Adobe Creative Suite, is not compatible with Mac® OS9. All Adobe Creative Suite components run only under Mac OS X.) You may find that upgrades aren't necessary but are nonetheless desirable. That is, InDesign may run perfectly well on your current computers with your current operating system, but the program will run even better on a newer, faster computer with the latest operating system. (For a complete list of InDesign system requirements for Mac OS and Windows®, go to the Adobe InDesign System Requirements page at www.adobe.com/products/indesign/systemreqs.html.)

Regarding hardware, the faster the computer, the faster any software, including InDesign, will run. And the more RAM you have, the better all of your programs will run and the more programs you can run simultaneously. It's worth noting that the performance of InDesign has improved significantly since the first version was released in 1999.

Create a support structure for InDesign users

Before you start training QuarkXPress users how to use InDesign, you should develop a support structure for your InDesign users. A good first step is to put together a group of in-house InDesign experts. Make them the first group to receive training. After they've been trained, ask them to evangelize the benefits of switching to InDesign and the relative ease of learning the program, as well as to provide on-demand training and support. Designate your top InDesign users as the resident experts and task them with collecting and distributing information about product and plug-in updates, common problems, tips and tricks, frequently asked questions, and so on.

In-house support can also include:

- **A library of InDesign reference books.** Several titles are available, including:

Adobe InDesign Classroom in a Book from Adobe Press (available for purchase at www.adobe.com/press/bookstore).

Real World Adobe InDesign CS by Olav Martin Kvern and David Blatner (Peachpit Press).

InDesign CS for Macintosh and Windows: Visual QuickStart Guide by Sandee Cohen (Peachpit Press).

Moving to InDesign: Use What You Know About QuarkXPress and PageMaker to Get Up to Speed in InDesign Fast! by David Blatner, Christopher Smith, and Steve Werner (Peachpit Press).

InDesign for QuarkXPress Users by David Blatner (Peachpit Press).

Adobe InDesign CS One-on-One by Deke McLelland (Deke Press).

How to Do Everything with Adobe InDesign CS by David Bergsland (McGraw-Hill Osborne Media).

Adobe InDesign for Dummies by Deke McLelland and Amy Thomas Buscaglia (Hungry Minds).

- **Subscriptions to the InDesign Talk mailing list.** This free e-mail discussion list, hosted by OmniPilot Software, Inc., lets you post and reply to messages about InDesign. If you have a question or encounter a problem, you can post a message to the list, and you can search the list archives to see if your question has already been discussed. To subscribe, unsubscribe, and search the list's archives, go to the list's home page at www.listsearch.com/indesigntalk.lasso?tab1=about&tab2=lists.

Other support resources

In addition to the in-house support resources you provide, you can also point InDesign users to support options available on the Adobe website:

- **Adobe CustomerFirst Technical Support** offers two pay-as-you-go support options: (1) Per minute. Pay \$2/minute. The cost is charged to your phone bill. For the Windows version of InDesign, call 900-555-2200; for the Macintosh version of InDesign, call 900-555-3300. This option is available only in the U.S. (2) Flat fee. Pay \$25 per incident. For the Windows and Macintosh versions of InDesign, call 206-675-6126. Adobe CustomerFirst Alliance support plans let you purchase one year of toll-free support. Several options are available. For information, call 800-685-3652.

- **The Adobe InDesign home page** on the Adobe website (www.adobe.com/products/indesign/main.html) includes a wealth of information about InDesign. There you'll find links to product information, customer stories, reviews, awards, events and seminars, and InDesign-related downloads, as well as several support- and training-related links.
- **The Adobe InDesign Support page** on the Adobe website (www.adobe.com/support/products/indesign.html) includes links to top support issues, tutorials, support-related announcements, and user forums. You can also subscribe to an InDesign RSS (Really Simple Syndication/Rich Site Summary) feed to receive current support information.
- **The Adobe Support –User to User Forums** home page at www.adobe.com/support/forums/main.html includes links to user forums for all Adobe products. These forums let you share questions, suggestions, and information with other Adobe software users around the world.
- **InDesign User Group** chapters have formed in major cities throughout the United States. The InDesign User Group home page at www.indesignusergroup.com/ has links to each of the InDesign user group chapters, as well as a link for meeting topic archives. The archives include meeting notes, presentations, and documents. The home page also includes links to other InDesign-related resources, including news and events, tips and techniques, and services and support.

Leveraging your legacy documents

Although InDesign can open some QuarkXPress documents (for detailed information about opening QuarkXPress documents, see Appendix B, “Opening QuarkXPress Documents with InDesign,” on page 16), the recommended best practice for ad agencies with legacy documents is to rebuild them using InDesign. Attempting to convert a potentially corrupted QuarkXPress document and then making it the foundation for years of future work can lead to unexpected results and other problems. After years of use, QuarkXPress documents can become bloated with unused and unnecessary fonts, colors, and style sheets, as well as other unneeded objects and information. Building new documents and templates with InDesign is a good way for new users to learn the program and ensures that you're starting out with clean, correctly constructed files.

Opening a QuarkXPress document with InDesign isn't the only way to move content between the two programs. Here are some other options:

- **Save Page as EPS.** If you need to use a single page of a QuarkXPress document in an InDesign document and you don't need to modify any of the page's content within InDesign, you can use the Save Page as EPS command (File menu) in QuarkXPress to save the page as an EPS file, and then use the Place command (File menu) to import the file into an InDesign document.
- **Export Document as PDF.** If you would rather work with PDF files than EPS files, you can use the PDF export feature in QuarkXPress to create a PDF file of the pages you want to place into an InDesign document.
- **Copy and paste.** If you need to move text from a QuarkXPress document into an InDesign document and you don't need to retain the formatting, you can use the Copy and Paste commands. You can also copy and paste pictures, but in most cases you shouldn't use this method because the link to the original graphic file is not maintained. Use copy and paste only for pictures that have no disk file (for example, screen captures).
- **XML.** You can export XML from QuarkXPress and import the XML file into InDesign.

Converting versus recreating QuarkXPress documents

If you're thinking about converting QuarkXPress documents into InDesign documents, you should begin by doing some experimenting. In general, the longer and more complicated a QuarkXPress document, the more likely you are to discover differences when you open the document in InDesign. If possible, it's best to recreate your QuarkXPress documents using InDesign. In addition to being an effective way to learn to use InDesign, recreating documents eliminates the possibility of conversion-related problems.

If you choose the conversion option, keep in mind that the process of converting everything in a QuarkXPress document—text formatting, graphics, character and paragraph styles, master pages—is not an exact science. While the programs are similar in many ways, there are also many differences. At best, a QuarkXPress document that's opened with InDesign is a starting point. You may discover that you need to modify the InDesign document to make it match the original QuarkXPress document. In some cases, you may find it easier to recreate a document than to find and change all of the differences.

Section summary

The questions you ask and the answers you find before you begin your transition to InDesign will provide the foundation for the switch and help you make the right choices for your site. When you're finished laying the groundwork, it's time to move on to the next phase: making the transition to InDesign.

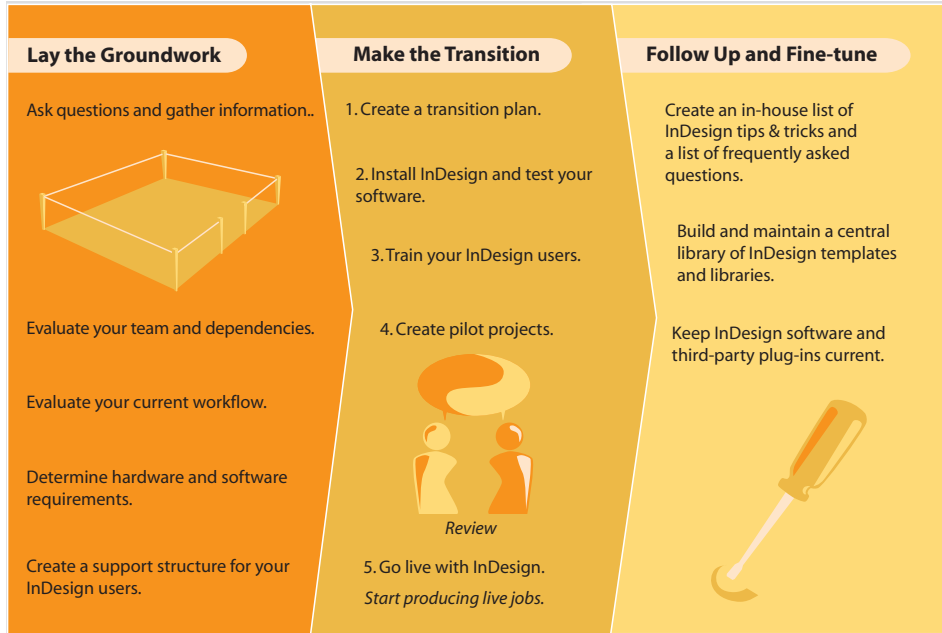
Make the Transition

Depending on the size of your company and the number of QuarkXPress users who will be making the switch to InDesign, a transition plan can range from simple and informal to highly detailed and carefully managed. Some sites will want to plan meticulously and make the transition in small, clearly defined, and closely monitored steps over an appropriate period of time. For other sites, a quicker and less-structured approach might make more sense.

The road map for your transition to InDesign can be a full-blown Microsoft Project document, a simple spreadsheet, or hand-written notes on a calendar. The size and complexity of your plan are not important. What's important is that you have one. During the transition, you may not hit every milestone on time or without challenges, but at least you'll always know where you are relative to your ultimate goal. If circumstances dictate, you can always modify your plan as you go.

Step 1: Create a transition plan

Nothing beats a good map when you're trying to get from here to there. It lets you know where you've been and where you're heading and can suggest alternate routes when unexpected detours occur. A transition plan for switching page layout programs provides the same benefits. By mapping out your course, you'll have an idea of where you are relative to where you had planned to be as you make the switch, and you'll know whether you need to make adjustments. A transition plan should not be carved in stone. While your migration may proceed exactly as planned, it's possible that you'll have to make some adjustments along the way. During a period of change, flexibility is an asset.



Set milestones, break points, dates, and deliverables Even the most basic transition plan should include a list of major milestones—the incremental steps that comprise your transition process. The rest of this section lists four basic milestones: install InDesign and test your software, train your InDesign users, create test publications, and go live with InDesign. For each milestone, assign a date, determine deliverables, and identify those responsible for each deliverable. For example, during the preparation phase (such as laying the groundwork), an IT manager might have the task of installing InDesign on the appropriate workstations, after which a training manager can begin the task of arranging InDesign training for a core group of QuarkXPress users. (If training will be done off-site, these tasks can occur simultaneously.) After initial training is complete (more about training later), you're ready to take the next step—creating test publications. When setting dates and deliverables, don't be unnecessarily aggressive. It's better to make the transition in small steps and allow ample time for each one than to create problems by trying to do too much, too fast.

If possible, try to include some break points that allow you to evaluate your progress without the pressure of a looming deadline. By building in some time for review and analysis, everybody has a chance to absorb what they've learned and you can make changes in the transition plan, if necessary.

In addition to the specific milestones you set, some tasks will be ongoing—especially communicating with employees, clients, and print service providers.

Keep Employees Informed Effective collaboration is the by-product of effective communication. When you begin to develop your transition plan, bring the key players together and get their input. The better you are about cultivating a consensus before you establish milestones and assign responsibilities, the smoother the transition will be. When you're ready to set a schedule and assign names to tasks and deliverables, make sure everyone involved knows their responsibilities from the beginning and when deliverables are due. If changes need to be made, make sure to inform everybody who's affected as soon as possible.

As early as possible, let your QuarkXPress users know that a switch to InDesign is coming and assure them that they'll have an opportunity to learn the new software before they'll be required to use InDesign for real-world publications. Assure them, too, that much of their QuarkXPress expertise is instantly transferable to InDesign—after all, they're both page layout programs—and that one of their biggest challenges will be to learn how to take advantage of all of the InDesign features that aren't available in QuarkXPress.

Communicate with Clients and Providers It's never too early to involve your clients, print service providers, and any other third-party companies with whom you exchange files. Chances are, you checked with your clients and providers about their ability to support InDesign before you made the decision to switch. Make sure you let your clients know how *they* will benefit from your migration to InDesign. For example, their publications will look better thanks to typographic features, such as optical kerning, optical margin alignment, sophisticated table-formatting controls, and full support of OpenType fonts. The integration among the components of Adobe Creative Suite 2 helps streamline production and reduce time—and cost—to press, and electronic mark-up and review will be easier because of the ability for clients to use the free Adobe Reader to add comments and notes to PDF documents.

As you get nearer to your go-live date, your print service providers will become increasingly involved. At the beginning of your transition, let them know when you plan to run test files and when you'll begin delivering live pages. Your print service providers may want to do some preparatory work of their own with InDesign before they begin working with your InDesign files. They may also be able to provide you with PDF export presets and print presets specifically created to ensure printing success in their shops.

(Note: If any of your service providers do not yet support InDesign but are interested in doing so, you can point them to the Adobe Solutions Network (ASN) Print Service Provider Program web page at partners.adobe.com/public/asn/psp/detail.html. There they'll find tools and information to help them integrate InDesign at their site, including an InDesign Print Service Provider Toolkit, a Printing Guide for Service Providers, resources to help attract customers, and links to InDesign training resources. You can also point them to the Adobe Print Resource Center at studio.adobe.com/us/print/main.jsp. This page provides access to the latest tools and documentation from Adobe for print production professionals.)

Step 2: Install InDesign and test your software

Before you begin the process of integrating InDesign into your workflow, you need to install either the standalone version of the software or Adobe Creative Suite onto the necessary computers and confirm that:

- You can print to all the printing devices in your local environment.
- InDesign users can access the servers used to store your agency's digital content/layouts and content.
- The software components—including non-graphic applications, such as word processors, e-mail clients, and anti-virus software—used on each InDesign workstation are compatible with each other.
- All electronic font files are correctly loaded and compatible with all of your publishing-related applications. You can find information about troubleshooting font-related problems for Windows and Macintosh operating systems on the Adobe website. For information about Mac OS X, go to www.adobe.com/support/techdocs/327791.html; for Windows information, go to www.adobe.com/support/techdocs/328607.html.

After InDesign has been installed and you've determined that your software environment is stable, you can begin testing InDesign by mimicking your current workflow and replacing QuarkXPress with InDesign. You may want to combine the testing phase with the training phase (covered in the next section) by using the documents you produce during training to confirm file format compatibility, hardware compatibility, and so on.

Because InDesign lets designers do many things that can't be done with QuarkXPress, one of the challenges for new InDesign sites and new InDesign users is to think differently about their page layout software and the creativity and productivity advantages it offers. For example, a page layout artist can use InDesign to add soft drop shadows to text and objects instead of having to request them from a Photoshop user or switch to Photoshop to create them. The option to apply soft drop shadows and perform other graphic-intensive tasks within InDesign not only lets page layout artists be more creative, it also cuts down on file management overhead and saves time that was previously spent switching between programs. During the testing and training phases of your migration to InDesign, watch for ways to take advantage of InDesign to improve your workflow and the appearance of your publications. Start a list of best practices and encourage everybody to contribute.

Step 3: Train your InDesign users

The time required to bring your QuarkXPress users up to speed with InDesign will depend on the number of employees that require training, how much these employees need to know about InDesign to do their jobs, and the amount of time and money available for training. Whether you decide to hire an outside trainer or you choose to have your employees teach themselves and each other, you'll discover that while InDesign has a broad set of features, the learning curve is not necessarily long, especially for users who are already proficient in QuarkXPress. New InDesign users who are also familiar with Illustrator and Photoshop will have even less difficulty because of the interface similarities—tools, keyboard shortcuts, commands, palettes—among Adobe graphics applications.

For QuarkXPress users, learning InDesign is essentially a two-step process. The first step is to learn to use InDesign to perform the tasks they've accomplished in the past with QuarkXPress—place and format text and graphics, lay out pages, and build documents. (Recreating QuarkXPress documents using InDesign is good practice at this point.) Once they've mapped their QuarkXPress skills to InDesign, all that remains is to learn to take advantage of the many InDesign features—such as transparency, object styles, multicolor gradients, and PDF presets—that aren't available in QuarkXPress.

InDesign training and educational resources

When it's time to arrange training for new InDesign users, many options are available. The choices range from off-site, instructor-led classroom training delivered by an Adobe-certified training provider to free, self-paced online tutorials available at the Adobe website (www.adobe.com). Below is a list of InDesign training and educational resources.

- **Adobe-Certified Training Providers** You can find Adobe training facilities and Adobe-certified trainers in more than 85 cities throughout North America. To locate an Adobe-certified InDesign training provider in your area, go to partners.adobe.com/asn/partnerfinder/search_training.jsp. This page lets you specify the Adobe products for which you require training and your state/province and country/region. When you perform a search, a list of training companies that match your search criteria is displayed with links to the websites.
- **Adobe Online Training** You can browse or buy online InDesign training, as well as training for other Adobe products, at adobe.elementk.com. Two free video-based InDesign lessons (Working with Graphics and Document Set Up) are available. The Adobe InDesign online training library features courses on creating basic publications, as well as working with type, graphics, and cross-media publishing tools. A custom course for print service providers is also available.
- **InDesign Help** One of the quickest and easiest ways to get help when you're using InDesign is to access the InDesign help system (File > Help). In addition to several tutorials that introduce basic InDesign concepts to beginning users, the HTML-based help system includes comprehensive information about all InDesign features, as well as an index, site map, and search engine that make it easy to find detailed information about any topic.

- **Adobe InDesign Tutorials** Several free InDesign tutorials are available at www.adobe.com/products/tips/indesign.html. These tutorials help you get up to speed on several InDesign features. This page also includes a link to the Adobe Studio web page (see next item), where you can find even more InDesign tutorials.
- **Adobe Studio/Tips and Tutorials** This page, at studio.adobe.com/tips/main.jsp, lets you search an extensive library of tips and tutorials from industry experts and Adobe product experts. You can search by product, media (print, web, digital imaging), and topic, as well as by content type (tutorial or video) and level (basic or intermediate/advanced). Several dozen InDesign tutorials are available, ranging from creating a new document to working with scripts.
- **Adobe InDesign—Training Resources** Go to www.adobe.com/products/indesign/training.html for information about special InDesign training resources, training programs, training videos, and tips and tutorials.
- **Adobe InDesign CS Classroom in a Book** This book contains a series of self-paced, project-based lessons ranging from basic to advanced and includes a CD with all of the files required to complete the projects. For information or to purchase this book, go to www.adobe.com/press/bookstore.
- **Adobe InDesign CS Conversion Guide: A Hands-on Resource for Switching from QuarkXPress to InDesign CS** Adobe created this booklet to help QuarkXPress users make a quick transition to InDesign. It explains key concepts, terms, and interface elements that are common to both QuarkXPress and InDesign, as well as fundamental differences. It also introduces QuarkXPress users to several powerful InDesign features that aren't available in QuarkXPress. To download a PDF version of the booklet, go to www.adobe.com/products/indesign/pdfs/indesigncs_conv_guide.pdf. (*Note: This link is to the InDesign CS Conversion Guide. An updated version of the guide is currently in production.*)
- **Video-based Training from Total Training** Total Training (www.totaltraining.com) offers two InDesign CS training courses. (1) Total Training Presents QuarkXPress to Adobe InDesign CS—Making the Switch (\$49.99) is a three-hour CD that explains how to make a smooth transition to InDesign. (2) Total Training for Adobe InDesign CS (\$249.99) is a set of four DVDs with 12 hours of training that includes everything from basic page setup and type formatting to advanced graphics and type effects and output.
- **Free InDesign Tutorial on CD from Total Training** Total Training offers a free 90-minute tutorial on CD-ROM with lessons for the entire Adobe Creative Suite and Digital Video collection, with a lesson dedicated to InDesign. To request the free tutorial, log on to www.totaltraining.com or call (toll-free) 800-561-6704 (U.S. only) or 1-760-944-3900 between 9 a.m. and 5 p.m. (PST) and ask for the free 90-minute tutorial disk.

Providing effective training

Although most QuarkXPress users will find that many of their page layout skills—such as creating new documents, selecting and formatting text, creating and modifying objects, and working with master pages—are directly transferable to InDesign, it will take some time and practice for them to get accustomed to the differences between the two programs and master the InDesign features that QuarkXPress lacks. Effective training can shorten the learning curve and help make the learning process a positive experience. Here are a few things to consider when you're deciding how to train your new InDesign users:

- **Allow for some play time before formal training** If possible, give your new InDesign users an opportunity to check out the program on their own before formal training begins. If any questions arise as they explore the InDesign interface and its feature set, they can serve as topics for discussion during training. If your agency hasn't yet purchased or installed InDesign, trainees can download the free 30-day tryout version from the Adobe Product Tryouts web page at www.adobe.com/products/tryadobe/main.jsp.
- **Customize your training** If you're an advertising agency that specializes in annual reports, it doesn't make much sense to learn InDesign by creating a catalog. Make sure the training you provide for your new InDesign users is appropriate for your site and your employees. If you're thinking about hiring a training provider, let the trainer know how you intend to use InDesign and ask if it's possible to customize the training to match your workflow, your publications, and the way you intend to use InDesign. Along the same lines, try to use your own text and

graphic files during your InDesign training. This gives you a chance to confirm InDesign's compatibility with the text and graphic file formats you've been using with QuarkXPress and, if you wish, to test other file formats. (**Note:** *InDesign supports all text and graphic formats supported by QuarkXPress, as well as several formats that QuarkXPress does not support.*)

- **Create a blended training solution** When it's time to learn new software, some people like to be trained in a classroom environment, while others prefer to teach themselves at their own pace and on their own computer. If possible, offer several training options and let users choose the method or methods they prefer. Make sure that each training option you offer covers the skills required of your new InDesign users.

Nothing beats a personal trainer when it comes to learning new software skills. If you have an in-house InDesign expert, make him/her available to new users. If novice InDesign users have an expert looking over their shoulder during their first day or two of training, they can get immediate answers to their questions and shorten the learning curve.

The rapid evolution of web-based training in recent years has been accompanied by a growth in what's called "blended learning," that is, custom training programs that combine several training methods—instructor-led classroom training, video-based/DVD training, live web-based training, self-paced web training, printed tutorials, and so on. By combining some of the training resources listed above, you can develop a custom and cost-effective training program that will quickly turn your QuarkXPress users into productive InDesign users.

- **If you're big, start small** Large sites that need to train a large number of QuarkXPress users might want to begin by arranging either on-site or off-site training for a small group of core users. After a core group has been trained, you have the option of having these employees train your remaining QuarkXPress users or continuing with your training provider. You can also use the core group as the first tier of support when new InDesign users have questions about the software and as evangelists to promote InDesign in-house to designers who have not yet been trained.

Step 4: Create pilot projects

After a significant portion of InDesign users has been trained (a significant portion could be a single designer or an entire production team depending on the size of your company), they should work on some pilot projects before they begin using InDesign to create real-world, deadline-driven publications. By working on pilot projects before you use InDesign for real-world work, you can confirm before you go live with InDesign that: (1) Your new InDesign users have acquired the skills necessary to create publications, and (2) Your print service providers can handle the InDesign-generated files you'll be sending. (**Note:** *You may want to combine this step with your training phase by sending the InDesign publications you create during training to your print service providers.*)

If time permits, have new InDesign users recreate several documents or templates that were originally created with QuarkXPress. After they're able to recreate QuarkXPress documents with InDesign, they can take the documents—and their skills—a step further by using some of the InDesign-specific features they learned about during their training, such as drop shadows, feathered edges, tables, and OpenType fonts. It's a good idea to create a few test documents that push InDesign to its limit. If your print service provider can handle artificially complicated InDesign documents, chances are they can also handle your less-complex documents.

If your site uses QuarkXPress templates, have your InDesign users open some of them with InDesign to see how the text boxes, picture boxes, styles, and master pages are converted. They'll probably want to create new InDesign templates, but examining some converted templates may give them a better understanding of the similarities and differences between the two programs. After they've created some InDesign templates, your InDesign users can use the templates as the starting points for a set of full-blown test publications.

Simply creating test publications is not an adequate dress rehearsal for InDesign. You should also ensure that your print service providers are able to output the files you create with InDesign—whether the files are native InDesign documents or InDesign-generated PDF files. Make sure you can print InDesign documents with your in-house printers. If you notified your providers about your intention to send test InDesign files with ample lead time, as suggested earlier, they should be ready for you when you begin sending test files.

Make sure all of your providers can successfully output the InDesign test files you send them on all of the devices they use for a typical job. If your workflow includes Matchprint proofs, digital proofs, film, or contact sheets, make sure your providers can create them from your InDesign files. It's far better to discover and solve printing-related glitches during test runs than to be surprised while outputting a real job.

If you don't have the luxury of including a separate test phase in your transition plan, you can use both InDesign and QuarkXPress to create publications in parallel. In this scenario, your designers create identical documents with both programs. The positive side of this approach is having a safety net in case you encounter any problems with the publications you create with InDesign. The negative side is the duplication of effort. If you take this approach, you can continue to use QuarkXPress files for final output until you've confirmed that your vendors can handle identical files created with InDesign. After that, you can use InDesign files for final output and use QuarkXPress as a backup until you're ready to fly solo with InDesign.

Step 5: Go live with InDesign

After you complete the testing phase of your transition process, the next step is to use InDesign for real jobs. At this point, you've successfully created—and your print service providers have successfully output—several InDesign documents that are similar to the documents you'll be creating when you go live, and you're confident you're ready to put InDesign to a real-world test. You may want to include a break period between your pilot projects and your go-live date so you can evaluate and make adjustments.

As with the other steps, allow a comfortable period of time for the go-live phase. For large sites, it may take a while to get all QuarkXPress users up to speed with InDesign. By starting small and spreading out the go-live phase, you can minimize the impact of the switch on your designers, your production personnel, and your workflow. For example, an advertising agency could begin using InDesign for a single project or a new client. After one project has been successfully created with InDesign and printed, others can follow, and you can adjust the pace of migration—faster or slower—based on your experience. A magazine publisher could begin with a single article or section. A catalog publisher could begin by creating a single catalog with InDesign.

Follow Up and Fine-tune

The task of improving your workflow and becoming more productive with InDesign is an ongoing process. After you've completed your migration to InDesign, you should evaluate the transition and create a list of benefits gained, lessons learned, and best practices.

Another post-migration task is to communicate the success of the rollout to the key stakeholders. Once you've completed all of the steps in your transition plan and are up and running with InDesign, let the stakeholders know that the transition period is over and that the switch to InDesign has been a success, as evidenced by better-looking publications, reduced time to press, and smoother relationships with clients and service providers.

As you look back on the transition process, you'll be able to determine and document the positive effects that the switch to InDesign has had on your business. For example, you'll probably learn that the ability to create soft drop shadows and other transparency effects within InDesign has saved time and money that would otherwise have been spent doing such compositing work in Photoshop. Or you may discover that the Adobe Paragraph Composer in InDesign produces type that requires significantly less manual adjusting than was required by your previous page layout software. Document these benefits and make sure all of your InDesign users are familiar with them.

After you're fully using InDesign, bring some of your key employees together to discuss the transition. What lessons were learned? Would you do anything differently in hindsight? Do any tasks remain? Chances are that during the transition your InDesign users learned a few things about the program that they weren't previously aware of. Encourage users to share their tips and tricks with each other. Put your collective InDesign expertise to good use and look for additional ways to further streamline your workflow.

After your transition to InDesign is complete, you can turn your attention and energy from making the switch to becoming a highly proficient InDesign site. As your InDesign users become more familiar with the program, they'll become more productive and more creative. They'll also become an invaluable resource for InDesign-related information and training. Here are a few suggestions for leveraging your in-house InDesign expertise:

- **Create a list of favorite InDesign tips and tricks and an InDesign FAQ** Creative designers come up with creative ways of using graphic software. Keep a list of your InDesign users' best tips and tricks and encourage them to add to the list whenever they discover a new way to use the program. Some of the best tips and tricks are time-saving techniques, and the more time your designers save, the more time they'll have to be creative. Similarly, create an in-house InDesign FAQ. Such a document is an excellent training tool for new users and a helpful troubleshooting tool for all users. You may even want to publish an ongoing in-house newsletter or e-mail publication that provides your InDesign users with tips, tricks, and updated information about how to be even more productive.
- **Build and maintain a central library of InDesign templates and libraries** Templates are great for saving time and ensuring consistency. Create a set of InDesign templates and, if possible, store them on a server so that all of your InDesign users have easy access to them. If you can, assign a Master Template Maker (perhaps an InDesign user who is particularly skilled at building documents) and have this person ensure that all templates are correctly built, named, stored, and used.
- **Keep your copy of InDesign and third-party plug-ins current** All software companies periodically release updates to their products—to fix bugs, add new features and improve performance. Assign a team member to check periodically for InDesign program updates from Adobe, as well as for updated third-party plug-ins and InDesign-related software, such as your font management utility and other graphics applications. When updates are available, make sure all InDesign users receive them. It's easier to troubleshoot problems if all of your InDesign users are working in an identical environment.

One last word of advice for sites that switch from QuarkXPress to InDesign: Keep a copy of QuarkXPress around, just in case. You never know when you'll need to resurrect and reprint an archived QuarkXPress document. Or, if you need to make minor changes to a document that was created with QuarkXPress, it may be easier to make the changes using QuarkXPress than InDesign.

Appendix A: Migrating to Adobe Creative Suite 2

Adobe Creative Suite 2 combines full new versions of these Adobe creative tools: Photoshop CS2, InDesign CS2, Illustrator CS2, and GoLive CS2, along with Adobe Acrobat 7.0 Professional. The inclusion of an updated version of Adobe Version Cue® speeds version management and file collaboration, while Adobe Bridge introduces centralized file browsing. In addition, the new Adobe Stock Photo service makes it easy to locate, purchase, and manage stock images. Adobe Creative Suite 2 also introduces streamlined support for consistent color and PDF creation to address the top requests from creative professionals worldwide, and its innovative workflow automation features help you perform routine production tasks more rapidly than ever. Based on open industry standards, Adobe Creative Suite 2 is the ultimate creative environment for print, web, and mobile design. Here's a brief description of some of the key components and features of Adobe Creative Suite 2.

Key Features of Adobe Creative Suite 2 for Ad Agencies

- **Adobe Bridge** The new Adobe Bridge, a file-browsing tool that's integrated with InDesign, Photoshop, Illustrator, and GoLive, helps speed up your design work by providing fast, efficient access to your creative assets. Bridge makes it easy to locate, browse, and organize InDesign layouts, Photoshop images, Illustrator graphics, PDF files, GoLive web pages, and a wide variety of standard graphics files. You can drag and drop assets from Bridge into InDesign layouts, and you can drag and drop InDesign objects into Bridge for use in other layouts. Scalable thumbnail views make it easy to preview assets as you work, and built-in XMP metadata support lets you view detailed information about assets, such as the creation date and copyright information. You can search for one or more assets with common metadata attributes—for example, all files that use a certain Pantone color or a set of fonts—and you can embed additional metadata information into selected assets. Additionally, Bridge provides central management of workflow automation scripts that perform routine production tasks, such as exporting multiple InDesign layouts as PDF documents, and lets you specify color management settings for all of the components in Adobe Creative Suite 2.
- **Version Cue** Version Cue is a version management and file collaboration tool that is integrated with many components of Adobe Creative Suite 2, including Bridge, to enhance the workflow of publishing workgroups. Version Cue lets you track the status of project files, share tracking information across a workgroup, and receive helpful reminders when updating versions or placing photos and illustrations into InDesign layouts. With Version Cue you can find files quickly, track multiple versions of files across applications, create relationships between files, and share files in creative collaboration without fear of overwriting another designer's work. Version Cue lets you track all versions of a file, including historical versions generated sequentially in a serial workflow and alternate versions generated in tandem in a parallel workflow.
- **Adobe Stock Photos** Adobe Creative Suite 2 lets you search for, browse, compare, download, and purchase stock photos from some of the world's leading stock photography providers. Bridge provides central access to the Adobe Stock Photos service, and all downloaded comps and high-resolution images are displayed in Bridge. You can use the Adobe Stock Photos service to search for and download comp images to use in an InDesign layout. Then, when the design direction solidifies, you can right-click a placed comp image in InDesign and automatically purchase and download the high-resolution versions—all without tracking names or ID numbers manually. After you download stock photos, you can double-click them in Bridge to modify them in Photoshop or drag and drop them into InDesign, Illustrator, or GoLive layouts.
- **PDF Integration** Adobe Creative Suite 2 delivers more consistent, reliable, and easy creation of PDF files. One of the most significant improvements is the introduction of shared PDF creation presets, which ensures consistent PDF creation across all of the components of Adobe Creative Suite 2. PDF presets are completely exchangeable across applications when you use the five built-in PDF presets or custom PDF presets that you or your print service provider create. For example, your print service provider can provide a custom preset specific to their printing environment or workflow systems, which you can use to prepare PDF files in both InDesign and Illustrator with the same ease. Adobe Creative Suite 2 also uses a common location for storing PDF presets, so they're easier to manage. Adobe Creative Suite components provide a more consistent PDF creation interface, making it easier to learn and to produce reliable results. With the Adobe Creative Suite 2, you can produce PDF files in Acrobat 4.0 (PDF 1.3), 5.0

(PDF 1.4), 6.0 (PDF 1.5), and 7.0 (PDF 1.6) format, or PDF/X, PDF/X-1a, and PDF/X-3 files for standards-based file creation. Whether you're exporting PDF files for client reviews, interactive presentations, web distribution, or high-end printing, you'll appreciate the enhanced control and reliability of PDF creation with Adobe Creative Suite 2.

- **Photoshop CS2** Several new features in Photoshop CS2 make the industry standard image-editing program even more powerful and productive. The Vanishing Point feature lets you maintain the proper perspective when you clone, brush, paint, or copy and edit images. You can select multiple layers in the Layers palette, and then move, delete, or assign the layers to sets. The new Smart Objects feature lets you scale raster objects without loss of quality, and you can copy and paste vector objects from Illustrator to Photoshop. If you subsequently edit a vector object in Illustrator, your changes are automatically applied to the object in Photoshop. The ability to customize Photoshop menus, shortcuts, and palette locations to better suit the way you work will make you more productive than ever.
- **Illustrator CS2** The latest version of Illustrator takes vector graphics to a whole new level. The new Live Trace feature turns scanned drawings into vector graphics easily. Use Live Trace to automatically turn a complex bitmap image into a beautifully detailed vector illustration that is easy to resize and modify without distortion. The Live Paint feature lets you paint vector graphics more intuitively by automatically detecting gaps that would previously have affected how fills and strokes were applied. The context-sensitive Control palette, similar to the Control palette in InDesign, provides quick access to commonly used tools and eliminates on-screen clutter by reducing the need to open multiple palettes.
- **GoLive CS2** Creating sophisticated and graphically rich web pages has never been easier. With GoLive CS2 you can drop native Photoshop, Illustrator, and PDF files into web pages and automatically compress them for web output using parameters you set. GoLive CS2 automatically converts these files into Smart Objects so that you can resize, crop, and uncrop the images in your web layouts without accidentally distorting them. Support of standards-based web design and development means that you can develop mobile and websites based on global standards, such as CSS, XHTML, SVG Tiny, and SMIL. Working with open industry standards means your websites can be viewed by leading browsers and the widest array of platforms and devices. A visual CSS layout window lets you build pages that conform to open web standards. You can easily produce and check type styles and adjust the position of elements using the visual CSS inspector, and the ability to use prebuilt CSS objects helps you quickly lay out text and graphics.
- **Acrobat 7 Professional** Using PDF documents for electronic review has never been easier now that anyone can use the free Adobe Reader 7 to add comments and text edits. For example, you can export an InDesign layout as a PDF file and then initiate an e-mail-based review in Acrobat. If you check the option that enables commenting using Adobe Reader, your clients can open the file in Adobe Reader and use the commenting tools to make edits. New PDF correction tools in Acrobat 7 Professional improve the quality of your high-end PDF output and help prevent costly mistakes on press. You can use the new Ink Manager to alias excess spot color plates to process colors and convert RGB objects in a PDF file to CMYK with precise control and verify that conversion took place. Enhanced output preview features include on-screen alerts about objects to which rich black is applied, objects that will overprint, and areas that exceed a user-specified total ink coverage. After being notified of these issues, you can make corrections to problem areas before you print.

Adobe Creative Suite 2 is a complete design solution for print, web, and mobile publishing. It's versatile, powerful, and customizable, which means you can easily adapt it to fit your workflow. With Adobe Creative Suite 2, everyone in your production workflow—including designers, page layout artists, production personnel, and print service providers—can work in an integrated environment using industry standard applications that share a common user interface and provide support for native Adobe file formats (.PSD, AI, and PDF). Adobe Creative Suite 2 builds on the success of the original Adobe Creative Suite to deliver a new level of integration, productivity, and creative freedom.

Appendix B: Opening QuarkXPress Documents with InDesign

You can use the Open command (File menu) in InDesign to open documents and templates created with QuarkXPress 3.3 through QuarkXPress 4.11, including single-language documents created with QuarkXPress Passport 3.3 and 4.1.x. (QuarkXPress 5.x and 6.x files are encrypted and cannot be opened by InDesign.) When you open a QuarkXPress document in InDesign, a new, untitled document is created. InDesign converts the original file information to native InDesign information. The following table shows what happens when you open a QuarkXPress document in InDesign.

ORIGINAL ELEMENT	CONVERTED ELEMENT
Text Boxes, Picture Boxes	Converted to InDesign text, graphics frames.
Style Sheets	Converted to InDesign styles.
Links to Imported Pictures	Preserved and appear in the Links palette.
Color Profiles	Because QuarkXPress uses different color profiles, they are ignored in InDesign.
Colors	Colors are converted exactly to InDesign swatches, except HSB, multi-ink, and library colors, which are mapped to RGB colors.
Master Pages	Converted to InDesign master pages.
Master Page Items, QuarkXPress Guides	Placed on the corresponding InDesign master pages.
Grouped Items	Remain grouped except where nonprinting items are included in a group.
Frames and Lines	Converted to the InDesign line styles they most closely resemble.
Superior Type Style	Not supported by InDesign. Superior converts either as the default superscript, or as subscript if the offset character has that attribute as well.
Keyboard Shortcuts for Paragraph Styles	InDesign reserves the number pad in combination with the Option, Command, and Shift keys (Mac OS) or Ctrl, Alt, and Shift keys (Windows) for use with paragraph styles. If you create a paragraph style keyboard shortcut in QuarkXPress using other keys, InDesign displays an error message and applies no shortcut to the converted style.

Because InDesign can open only files created with QuarkXPress 3.3 through QuarkXPress 4.11, you must save files created with QuarkXPress 5.x and 6.x as QuarkXPress 4 files before you can open them with InDesign.

If you need to open a document created with QuarkXPress 5.x or 6.x with InDesign, you can use the Save As command (File menu) in QuarkXPress to “save backwards.” For a QuarkXPress 5.x document, use the Save As command to save the document as a QuarkXPress 4.0 file. For a QuarkXPress 6.x document, use the Save As command to save the document as a QuarkXPress 5.0 file, and then use QuarkXPress 5 to save the document as a QuarkXPress 4.0 file.

Whenever you save a file in a format that’s compatible with an earlier version of any software, all information related to features in the newer version of the software is either disregarded or converted to features available in the older version.

Note: *Third-party utilities for saving QuarkXPress 5.x and QuarkXPress 6.x files in QuarkXPress 4.x format may be available in the future. If and when such third-party utilities become available, information about them will appear on the Adobe website. Please check the Adobe website (www.adobe.com) periodically for information about third-party solutions.*

Here are a few things to keep in mind if you decide to convert QuarkXPress documents:

- InDesign does not support Microsoft's Object Linking and Embedding (OLE) or Quark XTensions. Consequently, when you open QuarkXPress files that contain OLE or Quark XTensions graphics, those graphics will not appear in the InDesign document. If your QuarkXPress document does not convert, check the original file and remove any objects that require an XTension, then save and try to convert the document again.
- By default, new InDesign documents, as well as documents converted from QuarkXPress, have only one layer, called Layer 1.
- When you convert QuarkXPress documents, ICC-compliant profiles embedded in images contained in the converted document are preserved and treated as if placed directly into a new InDesign document. This means you can use the Image Color Settings command (Object menu) to control profile settings for those images. Profiles that are not ICC-compliant will be replaced using the default CMS settings and profiles you specified for InDesign.
- Before you convert a QuarkXPress document into an InDesign document, you should store all imported picture files in a single folder, relink all pictures in the QuarkXPress Picture Usage dialog box (Utilities > Usage > Picture), and then save the document. This ensures that all links are preserved.
- If you experience problems with a QuarkXPress document that you've opened with InDesign, one solution is to export the document as an InDesign Interchange (.inx) file and then open the exported file. To export a document in InDesign Interchange format, choose File > Export, and then choose InDesign Interchange from the Format menu. Use the Open command (File menu) to open the InDesign Interchange file.

For additional information about opening QuarkXPress files in InDesign, go to www.adobe.com/support/techdocs/329065.html. This page on the Adobe website describes what happens to various features, settings, and page elements when you open QuarkXPress files in InDesign.

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