

## Adobe InDesign

(taken from Help Documentation by University of Wisconsin – Eau Claire)

### Process

- Brainstorm and Prepare
- Write the Articles in Microsoft Word
- Locate/Develop the Images
- Explore Layout Options
- Make Layout Decisions
- Sketch the Layout on Paper
- Pull Everything Together in InDesign

### Make Layout Decisions

Creating the layout for your InDesign publication includes a variety of components, each of which contributes to the overall look. You have a number of choices to make for each layout option.

#### Masthead

Where will the masthead be placed (e.g., top, side, or bottom of the first page)?

#### Header and footer

What information will be included in the header and footer? Will each page contain the same headers and footers, or will odd pages differ from even pages?

#### Layout grid

What size margins will be used? How many column guides will you create? Will they be evenly spaced?

#### Graphic placement

Will graphics be placed above, below, beside or incorporated within your articles? How will text wrap around your graphics?

#### Text styles

What font face, size, and alignment will be used for headlines? Subheadings? Body text? Captions?

### Creating a new document

**Bleed** The Bleed area allows you to print objects that are arranged at the outer edge of the defined page size. For a page of the required dimensions, if an object is positioned at its edge, some white may appear at the edge of the printed area due to slight misalignment during printing. For this reason, you should position an object that is at the edge of the page of the required dimensions a little beyond the edge, and trim after printing. Bleed area is shown by a red line on the document. You can set bleed area settings from Bleed in the Print dialog box.

To allow for deviations in cutting the paper to **finished size** an element that **bleeds** off the page is typically extended about 1/8" beyond the trim lines.

### Working With Pages

#### Inserting Pages

From the *Pages* palette, select the page that will **precede** the inserted pages  
Click **CREATE NEW PAGE**. A new page is inserted after the selected page.

#### Inserting Pages: Dialog Box Option

From the *Pages* palette, click **MENU»** select **Insert Pages...** To specify the number of pages to insert, in the *Pages* text box, type the desired number

From the *Insert* pull-down list, select where you would like the new page(s) inserted (e.g., After Page, At Start of Document)

From the *Master* pull-down list, select the **master page** to be applied to the new pages **OR** to apply no master page formatting, select **[None]**

**HINT:** The **master page** acts as a template and governs certain elements (e.g., formatting).

### Removing Pages

From the *Pages* palette, select the page(s) to be deleted

**HINTS:** To select multiple contiguous pages, hold **[Shift]** while clicking. To select multiple non-contiguous pages, hold **[Cmd]** while clicking.

Click **DELETE SELECTED PAGES**

## Rearranging Pages

### Rearranging Pages: Palette Option

Select the pages to move, click and drag the page icons to their new position. The pages are rearranged.

### Rearranging Pages: Dialog Box Option

From the *Pages* palette, click **MENU**» select **Move Pages...** OR From the *Layout* menu, select **Pages** » **Move Pages...** The *Move Pages* dialog box appears.

In the *Move Pages* text box, type the numbers of the pages you wish to move

From the *Destination* pull-down list, select whether you want the pages to appear before or after a selected page, or at the beginning or end of the document

## Master Pages: An Overview

Master pages act as a foundation for your document; they allow you to type or draw information once, then apply the master page to other pages of your document so this information appears on each of the pages.

Master pages are most useful when creating documents where the same elements need to appear at the same location on multiple pages.

The Master pages feature in InDesign CS3 acts much like a template; it allows you to keep elements consistent on each page of your document. The *Pages* palette is used to easily navigate between the pages of your document.

## Design Elements

Some elements that might be useful to include on your master pages are the following:

- a layout grid and/or ruler guides
- page numbers
- graphics

## The Pages Palette

The *Pages* palette is the easiest way to move between master pages and document pages, apply master pages, and create additional pages from a master page.

The *Pages* palette is divided into two sections: the master page pane and the document pages pane.

The top half of the *Pages* palette is the master pages pane. It shows all available master pages, as well as an icon for removing master page formatting from a page. Each master page displayed in the *Pages* palette has a unique prefix to differentiate it from the other master pages, as well as an icon on the right side of the palette indicating whether it contains information for a single page or for both pages of a two-page spread.

The bottom half of the *Pages* palette is the document pages pane. This pane shows icons for all the pages of your document and indicates whether they appear as single pages or part of a two-page spread. Each icon has a letter displayed on it, specifying which of the master pages is applied to this page. If a page has no master formatting applied, no letter appears on the icon.

## Formatting the Default Master Pages

By default, the *A-Master*, or default master page, is applied to all pages in your initial publication. This includes basic default formatting options, such as margins. Changing or adding design elements to your master page is an easy way to create the basic format of your document.

To format **even-numbered** pages in a document with facing pages, in the *Pages* palette, double click a **left A-Master** page icon To format **odd-numbered** pages in a document with facing pages, in the *Pages* palette, double click a **right A-Master** page icon

Design the page by adding any text and graphic elements that you want to appear on each page of your document

When finished, view the results by double clicking the icon for any document page(s) The page appears on the screen.

## Creating Additional Master Pages

For some pages of your publication, it might be helpful to have a different master page to apply From the *Pages* palette, click **MENU**» select **New Master...** The *New Master* dialog box appears.

In the *Prefix* text box, type a unique prefix for your new master page. In the *Name* text box,

type a name for your new master page.

**OPTIONAL:** To base the new master on an already existing master, from the *Based on Master* pull-down list, select the master it will be based on.

### Applying Master Pages

By default, the *A-Master* is applied to all pages in your initial publication. You can apply a different master to any page(s) in your document by using the **Apply Master dialog box** or the **Drag and Drop method**. If you decide to create a document without applying the *A-Master*, you need to **Remove the Master Pages Format**.

#### Applying Master Pages: Dialog Box Option

In the *Pages* palette, select the document page icon(s) to which you would like to apply the master

Click **MENU**» select **Apply Master to Pages...** The *Apply Master* dialog box appears.

From the *Apply Master* pull-down list, select the master you would like to use

In the *To Pages* text box, type the range of pages you would like the master to apply to

#### Removing the Master Pages Format

To create a document without master page formatting, you can simply remove the *A-Master* formatting from the pages.

In the *Pages* palette, select the document page icon(s) that you want to appear without master page formatting

From the *Pages* palette, click and hold the **NO MASTER PAGE FORMATTING** icon

Drag the icon to the pages you wish to remove master page formatting from

### Hiding Master Page Items

If you want to hide the master page items on one or more pages of your document, use the *Hide Master Items* feature. **NOTE:** When items are hidden, they do not print.

#### Hiding Master Page Items: All of the Items

Click the page icon in which you do not want the *Master Items* displayed

From the *Pages Palette*, click **MENU**» select **Hide Master Items**

#### Hiding Master Page Items: Selected Items

Double click the page icon in which you do not want selected *Master Items* displayed. The page appears in the document window.

To hide a selected master item(s), in the document window, press and hold **[Cmd]+[Shift]** while clicking the desired item(s) The master item(s) is selected.

Press **[Delete]** The selected item(s) is removed from the desired page but still remains on the master.

### Displaying Rulers

To display rulers, from the *View* menu, select **Show Rulers** OR Press **[Cmd] + [R]** Vertical and horizontal rulers appear.

To lock the ruler guides, from the *View* menu, select **Grids & Guides** » **Lock Guides** OR Press **[Opt] + [Cmd] + [;]**

To display ruler guides, from the *View* menu, select **Grids & Guides** » **Show Guides** OR Press **[Cmd] + [;]**

### Numbering Pages

To have InDesign automatically number your pages:

Double click the desired master page icon

In the document window, use the *Type Tool* to create a text box where you want the page number to appear on the page

From the *Type* menu, select **Insert Special Character** » **Markers** » **Current Page Number**

Page numbers will automatically appear on the pages corresponding to that master page.

**NOTES:** If you have multiple master pages, you will have to repeat these steps for each master page.

If your master page(s) has a double-page spread, you must repeat these steps for each page of the master spread.

## Working with text

### Creating Styles

A style is a specified setting for characters or paragraphs in your document; they are helpful for documents that have several formatting changes (e.g., titles, section headings, text, lists) and for projects that more than one person is working on. Using styles allows you to format with a single click, rather than individually changing each element of your text. Styles can make documents more consistent and save you time.

### Creating a Character Style

You have several options when creating a style. You can define a new style based on an already existing style, or from text that is already formatted. Character styles should be applied to one or more words (e.g., words you want to emphasize or vocabulary words).

#### Creating Character Styles: From Formatted Text

From the *Toolbox*, select the **Type Tool**

Select text with attributes you want to include in your style

On the *Dock*, click **CHARACTER STYLES**

In the *Character Styles* palette, click **MENU**» select **New Character Style...** The *New Character Style* dialog box appears.

In the *Style Name* text box, type a name for your new style

Click **OK**. The new character style appears in the *Character Styles* palette with the style settings of the selected text.

**OPTIONAL:** To define a new style based on an already existing one, from the *Based On* pull-down list, select the desired existing style

**HINT:** This option is useful if you want to change only a few things about an existing style; you can make the desired changes and save the modified style under a new name.

### Creating a Paragraph Style

Paragraph styles apply both paragraph and character formatting to one or more paragraphs. You can create paragraph styles either from an existing paragraph style or from a paragraph that is already formatted.

#### Creating a Paragraph Style: From Formatted Text

From the *Toolbox*, select the **Type Tool**

Place your insertion point within a paragraph with the desired formatting

On the *Dock*, click **PARAGRAPH STYLES**

In the *Paragraph Styles* palette, click **MENU**» select **New Paragraph Style...** The *New Paragraph Style* dialog box appears.

In the *Style Name* text box, type a name for your new style

Select desired attributes

Click **OK**

### Applying Character/Paragraph Styles

Select the character(s) or paragraphs to which you want the styles applied

In the *Character Styles* or *Paragraph Styles* palette, click the desired style name.

### Editing a Style

You may decide later that the specifications originally set for a style are not what you want. You can edit the style so that the change you make occurs for every instance of that style in your document.

From the *Toolbox*, select the **Type Tool**

Deselect any text or paragraphs before editing styles

In the *Character Styles* or *Paragraph Styles* palette, double click the style to be changed

The *Character Style Options* or the *Paragraph Style Options* dialog box appears.

Make the desired changes.

### Grids

Two kinds of nonprinting grids are available: a **baseline grid** for aligning columns of text, and a **document grid** for aligning objects. On the screen, a baseline grid resembles ruled notebook paper, and a document grid resembles graph paper.

## 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.

Choose InDesign > Preferences > Grids

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.

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

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

Select text.

In the Paragraph panel or Control panel, click Align to Baseline Grid

## Creating Bulleted and Numbered Lists

Select the text

If the *Command Bar* is not already displayed, from the *Window* menu, select **Object & Layout » Command Bar**

From the *Command Bar*, click **NUMBERED LIST** or **BULLETED LIST**

## Changing a Bullet Character:

Select the bulleted list you want to change

From the *Command Bar*, press [Opt] + click **BULLETED LIST**

## Inserting Special Characters

*Type* menu, select **Insert Special Character** or **Glyphs**

## Working with Tabs

Tabs allow you to line up text vertically in a document.

If the *Tab* panel is not displayed, from the *Type* menu, select **Tabs**

**OPTIONAL:** To place the *Tab* panel directly above a selected text frame, click **POSITION PANEL ABOVE TEXT FRAME**

**HINTS:** You must either have your cursor placed within the desired text frame or text selected within it. Arrows on the *Tab* ruler will show a preview of where your tabs will be placed.

## Setting Tabs

You can set left, center, right, decimal, or special character tabs. When you use the special character tab, you can align a tab to any character you choose.

Select the paragraph(s) or text frame in which you would like to apply a tab

From the *Tab Alignment* buttons, select the desired alignment

On the *Tab* ruler, click the desired position for the tab **OR** in the *X* text box, type a new location. An arrow appears above the ruler to show where the tab has been set.

**NOTE:** Clicking more than once on the *Tab* ruler causes several tabs to be set. In order to move a tab after it has been set, click directly on the arrow and drag it to the new

location.

To align a section of text with your tab(s), place your insertion point at the beginning of each section and press **[Tab]**. The section(s) is aligned with the specified tab(s).

### Graphics Formats

InDesign suggests using EPS for vector graphics and TIFF for bitmapped graphics. These file formats support precision output for text and high resolution graphics; however, the file size is significantly larger in these formats. For a smaller file size or for web publishing, JPEG or GIF images are feasible alternatives.

### Graphics Placement Types

The type of document and the nature of the graphic that you are working with will generally determine the kind of placement that you use for your graphics. When placing graphics (not including InDesign lines or shapes), you place them as either inline or independent graphics. Independent graphics are placed by using the *Selection Tool* while inline graphics are placed using the *Type Tool*.

### Using Text Wrap

*Text Wrap* allows you to shape your text around an object in a number of ways in order to place an object anywhere in a text block.

### Wrapping Text to a Standard Boundary

Select the desired object

If the *Text Wrap* palette is not displayed, from the *Window* menu, select **Text Wrap**

Select the desired **text wrap option**

To set the space between the text and the object (offset distance), in the *Text Wrap* palette, use the *Offset* text boxes or nudge buttons to indicate the desired values

**NOTES:** To move text away from the edges of the boundary, use positive numbers. To move text closer to the edges of the frame, use negative numbers.

### Wrapping Text to a Custom Shape

The option *Wrap Around Object Shape* allows you to customize the boundary that text wraps to, giving the wrapped text edge the same shape as the selected object. The boundary can be customized by dragging anchor points around the shape of the object.

**NOTE:** This option is only available with independent graphics.

In the *Toolbox*, select the **Direct Selection Tool**

Select the desired object

From the *Text Wrap* palette, click **WRAP AROUND OBJECT SHAPE**. A blue border with anchor points appears around the object.

To set additional anchor points,

In the *Toolbox*, select the **Add Anchor Point Tool**

Click along the blue boundary of the image/object

**NOTE:** The *Add Anchor Point Tool* is accessed through the *Pen Tool*.

To remove anchor points,

In the *Toolbox*, select the **Delete Anchor Point Tool**

Click the anchor points you want to remove

To shape the boundary of the object to the desired contour,

In the *Toolbox*, select the **Direct Selection Tool**

Click and drag the anchor points to the desired position

### Export to PDF

When you export an InDesign file to PDF, you can preserve navigation elements such as table of contents and index entries, and interactivity features such as hyperlinks, bookmarks, media clips, and buttons. You also have the option of exporting hidden layers, nonprinting layers, and nonprinting objects to PDF.