

InDesign is different from Illustrator and Photoshop in the sense that it's a giant linking program: your Photoshop files stay in Photoshop, Illustrator in Illustrator, and InDesign just links to them. InDesign is not really a vector program, nor is it a raster, but a page layout one. Your typesetting and layout takes place in InDesign, your graphics in Illustrator, your imagery in Photoshop. InDesign is a more stable, user-friendly, and modern form of Quark of the 90s, and Pagemaker of the 80s. It's different from Word and Pages in that it offers complete page layout control.

When you setup a **new document** decide whether you will need spreads (facing pages) or single pages. Your margins and columns can be setup or changed later if you don't want to do it in the opening dialogue. The units of measurement for pages and margins will probably come up in inches by default. Your **units of measurement** can be changed under preferences. There are 12 points per pica, and 72 points per inch. 1p6 = 18 points, 2p0 = 24.

You start on page 1 automatically, but during initial setup decide whether or not you need to use a **master page**. Things on your master page show up on all regular pages that have the same letter in them as their master (in the pages palette, 'A' is the first master page, and all the pages below it have an A in them too). Things you can put on your master page include your grid, page number, or anything that will be in the same place throughout your document. You can set up more than one master page (perhaps you don't want page numbers to show up on every page.) To apply master pages to specific pages, drag the master page rectangle into the pages listed beneath. Adding pages to your document can be done with the 'new page' button at the bottom of the **pages palette**. Add a new master page under the menu **≡** in the corner of the palette. When making a second master page, you can choose to have it be based on your first one. This, in a sense, piggy-backs the second one off the first.

Creating an asymmetric **grid** is a matter of pulling cyan guidelines out from the rulers. To toggle them on or off, press **⌘** semi-colon. Create a symmetric grid under **Layout** menu → **Create Guides**. The **baseline grid** spacing is changed under the main software preferences and can be toggled under **View** menu → **Grids & Guides**. None of the text will adhere to the baseline grid unless it's told to do so; in the paragraph palette you can force the text to sit properly on the grid. If your grid is not showing up at all, zoom in to 100% view.

Creating a **text box** begins with the type tool in the tool bar. Draw your text field, then type, place, or paste your text into it. If your text overflows, a red box appears in the lower-right corner **☒**. To flow the text into a new text box or onto another page, click the red box, then draw a new text box on the other page. If you have a new text box waiting for you, just click it to link them together. It's important to have text boxes **linked together** so that if formatting changes are made, text throughout the document will shift accordingly. You can link text boxes before text is even in them too; just click the lower-right blue box to start out. A master text frame will enable you to flow many pages of text by preparing a text frame for you on the master page.

Typesetting takes place in the palette at the top of the screen and also in the Character and Paragraph Style Sheets. The palette at the top toggles between character and paragraph settings, and when no text is selected, it becomes

the object settings palette. The **character settings**, from left-to-right has typeface and font selection, point size, leading, kerning, letter spacing, baseline shift, stretching and distorting. Always set your leading to something; don't let InDesign make the decision for you. InDesign also has **optical kerning**, which should most likely be on. Exceptions are script faces where the strokes between letters need to match up, and also newer typefaces (those from H&FJ) which have kerning built in. The right side of the palette has a sub-menu **≡** where you can use OpenType features like automatic **ligatures**, swashes, and appearance of numerals. Tabular lining numerals will have equal width and sit above the baseline for financial sheets and orderly arrangement. Oldstyle figures drop below the base-line for in-text use of numbers. Tabular Lining 1234567890 Oldstyle Prop. 1234567890

Paragraph settings includes text alignment and justification, as well as size of indents, margins, paragraph spacing, drop caps and more. The sub-menu **≡** in the paragraph palette contains your **hyphenation** settings (which by default is turned on), the appearance of **bullets** and numbered **lists**, keep options which helps keeps sentences from straying to the next page, and paragraph rules.

Paragraph rules are helpful in structuring content areas, as seen here. Always *hang text from a rule*. They also can be used in creating precise business forms, seen below. With paragraph rules enabled, each time you press return it will automatically add a rule into the text. To override it, use a **soft return** (shift-return). Use offset to prevent your descenders from getting interrupted by the line. You can also use paragraph rules to create reversed text blocks.

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A useful palette is **Glyphs**, which shows you all characters within a font for the times you need an ellipsis, trademark, fraction, prime mark, ornament, or diacritic but can't remember the key-stroke. Multiple styles of a character can be found by clicking and holding on the characters which have a small arrow in the corner **▶**.

All of these typographic adjustments can be made by using character and paragraph **style sheets**. These make life much easier and more efficient, especially when you're typesetting a complex or long document. Setup style sheets to have uniform typographic settings for things like headlines, bylines, subheads, captions, body copy, and so-on. Character styles are appropriate for shorter uses, and paragraph styles for expanded functionality like paragraph spacing, tabs, rules, and lists. With style sheets you can quickly change a typeface at the request of an editor, or following document testing. You can also pass your styles off to a team of designers to ensure that the type is all the same, just like you would share the grid to ensure uniform layout. Create your style sheets and apply them by highlighting text or clicking the text box, then clicking the style sheet.

To override a style in a particular part of the text (e.g. embolden or italicize a word), simply make the change. Once doing so, a + will appear in the style sheet palette signifying an override. To **clear all overrides** (helpful when working on imported text), select the

text or text box, then option-click on the style sheet. Style sheets can be duplicated under the sub-menu **≡**. They can also be nested in the general settings screen. Assign shortcuts to style sheets for quick application. This is also in the general settings screen and best to assign as shift, plus a number.

Lorem Ipsum text can be generated automatically. With the cursor ready, go to the Type menu → Fill with Placeholder Text. The Type menu has other features like special characters, auto **page numbers**, page breaks, and access to text-frame options, helpful for building **columns** right into your text frame.

When you **lineate** your text (check your document for sense breaks), use **soft returns** (shift-return) so that your words are technically still within the paragraph and the software doesn't think you're returning the word into a brand new paragraph. Ideal number of **characters per line** is about 40, and a maximum of 65. Lineation should be the very last thing you do because a change in type size could throw off all your soft returns.

"Hang quotes" can be controlled with optical margin alignment, under the Story palette. Turning them on or off affects all text within a frame.

Find/Change under the Edit menu is helpful in removing writers' habits of "period-space-space." You can also find and change typographic settings if you're not using styles (e.g. find all 10 pt type, change to 9 pt type).

Tabs can be built into selected text, entire bodies of text, or into paragraph styles. Like leading, don't let InDesign make decisions on tabs for you: set them yourself. Highlight your text and define tabs under the tabs palette. Repeat a tab under the sub-menu **≡**. The different types of tab arrows determine whether the text will align-right on the tab, -center, -left, or to the decimal. Like style sheets, tabs can be over-ridden for certain portions of text by highlighting just that part and making changes. When you want your tabs to apply to the entire field of text, make sure you select all of the text before you move, add, or delete tabs. Tabs are helpful in building tables of contents, business forms, financial tables, and for aligning your text with the grid.

Text does not have to be within a formal text box; any vector path can be used as a **text path** and can be used by clicking and holding the text tool in the tool bar, then selecting a path to type on. Settings are found under the Type menu.



When you incorporate images into your documents it's important that you **place your files** instead of paste—vectors from Illustrator, photos from Photoshop, text from Word, everything except for PDFs and other InDesign files. This is located under the file menu. Placing files creates a link between the InDesign document and the image document, a jpg for example. If you decide to make changes to a photograph, you can do so in Photoshop, and it will then be updated in InDesign. If it does not update automatically, open the **links palette** and click on **update links** at the bottom.

Images appear within blue **frames**, which are just that: frames. The image itself is *inside* the blue frame and is really surrounded by a brown box. Use the selection tool **⌘** to move the frame, and the direct-select tool **⌘** to move the image within the frame. The blue frame can be used to crop the image without actually cropping the original, linked file. The blue frame can be cut

and deformed with the pen tool to create an unconventional **text wrap**, settings to which are found in the text wrap palette. Image frames don't have to begin as rectangles; you can place images into any sort of vector path like a circle, triangle, or complex path from Illustrator. When you add a text wrap with padding, a lighter blue outline appears where the text will align itself. Images can be placed into any closed paths you create like circles and clipping masks, not just squares and rectangles. Create specific sizes for shapes by using the shape tool and clicking it in your document (as opposed to drawing it). This will prompt you for dimensions.

Resize images by either resizing the blue image frame, then selecting a fitting under the Object menu. Alternatively, you can use the **scale** function from the tool bar. Scale resizes both the image and the blue frame at once. **Align images** to other objects using the Align palette.

Images and vectors can also be pasted in-line with text, fully embedded within a text frame. This is suitable for **☐** check boxes, **→** arrows (that aren't glyphs), and sparklines *sparkline*. Copy the image or vector and paste it as you would text. Complex vectors must be **grouped** as one. **Anchoring** is a less-clunky way to lock larger objects to text.

Text, letter forms, and dingbats can be converted to vector paths to either modify with the pen tool, or to create precise wraps around a drop cap, for instance. Select your text or letter form, then **Create Outlines** under the Type menu.

Work with **color** in the color and swatches palette. By default, greyscale appears. Change to RGB, CMYK or Lab color under the sub-menu **≡**. To choose color on your own, do so in the color palette. Save your colors in the **swatches** palette which can be shared for standards in color use. To import swatches, such as **Pantone** color swatches, select **New Color Swatch**, pick from the color mode menu, and **Add** the colors to your document's swatch. The **eyedropper** can help when you're picking and applying color across many objects. The eyedropper can also grab text and line styles. **Trapping color**, and **separations** can be found under Window menu → Output.

Generating a **Table of Contents** is entirely dependent on your use of paragraph styles. It may sound strange, but it functions well in the end. Define your chapter titles as their own paragraph style; the automatic generation of your TOC will look for all uses of the style and the text used within it. Find TOC under the Layout menu. **Footnoting** is controlled in the Type menu; format options can also be controlled beneath. **Indexing** a book uses the Index palette. Normally this would be passed off to someone other than the designer, but InDesign helps reduce indexing time to index to a certain extent. Creating a book can either be done in one document, or across many InDesign documents, broken up by chapter for instance. Under File → New, **book** will generate a new palette in which you can select many documents. Page numbers and TOC will still stay intact if you build your book this way. Working with complex vectors or very large images can slow down the computer's performance and cause frustration. This is one of the only cases in which **Layers** can be helpful. Place these objects on their own layer and turn it off while you're working on the rest of the document. You can also change the **display performance** under the View menu. If your images look grainy, increase the display performance.

When you have an InDesign file with dozens of placed files, all linked to somewhere on your hard drive, **PDFs** and **packaging** is important when you go print or transfer files. Packaging your file creates a tidy folder with your InDesign file, all the linked files, the fonts used, and instructions (for the printing press). This is under the file menu. Creating a PDF is under 'Export...' The **resolution** you choose for your PDF can be important. If you plan to e-mail the file for proofreading, 72dpi is fine. For the printer always use 300dpi. For professional print jobs with printers whom you trust, provide them with both a package and a PDF.

Use InDesign in lieu of Powerpoint to generate **slide show** presentations. Build a grid, place images and text, then export as a PDF. Adobe Reader has a *display full screen* function which you can click through. InDesign can also incorporate buttons and media files for this purpose.

Save-down to previous versions of InDesign by going to Export or Save A Copy and selecting IMDL format.

To create **book spreads** use Print Booklet from the File menu. Instead of exporting directly to PDF, Print Booklet will by default output to a Post Script file, which you can then turn around and print.

Many of the features found in menus can also be found in **contextual menus**, menus that appear when you right-click.

Font formats include TrueType (.tt), Type 1 (.t1), and OpenType (.otf). OpenType is the most modern of the three and can contain an entire typeface in one file (though it's rare in practice). InDesign handles OpenType in smarter ways: ligatures can be automatic, as well as fractions and swashes. OpenType may contain true small caps, expert sets, foreign language sets, and it's printer-ready.

Installing your fonts can be done through Font Book, Font Explorer, Suitcase, or other font software. A quicker way is to do so manually in your Home folder → Library → Fonts. Adobe Typekit is a synced online service for typesets.

Useful keystrokes
Be careful of stray, t's, v's, and W's that might slip into your text as a result of using these shortcuts!

space	hand tool
v	selection tool/arrow
a	direct select
w	preview/normal mode
shift w	full screen preview
t	text tool
s	scale
r	rotate
z	zoom
h	hand tool
z	undo
⌘ shift z	redo
⌘ a	select all
⌘ x	cut
⌘ c	copy
⌘ v	paste
⌘ d	place...
⌘ g	group objects
⌘ shift g	ungroup
⌘ shift t	tabs palette
⌘ ;	show/hide your grid
⌘ shift	scales objects proportionally
	rotates objects at 45°
	moves objects on an axis

Until you know what you're doing, use only these fonts:
Avenir Baskerville
Bodoni Clarendon
Century Didot
Futura Frutiger
Gill Garamond
Helvetica Lubalin
Meta Minion
Thesis Univers