

UWTSD Swansea

Faculty of Art and Design

BA (Hons) Illustration: Lecturer - Iwan Vaughan

InDesign Introductory Workshop Notes 2016

Introduction

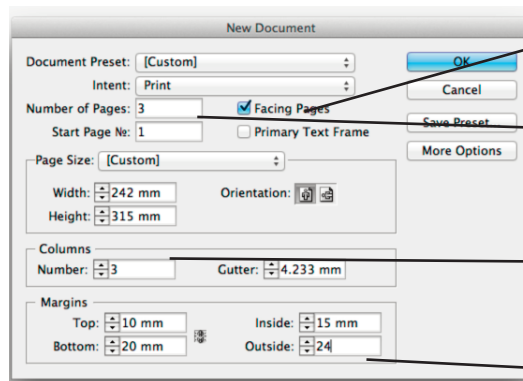
InDesign is a Desktop Publishing application used in the creative industry. It is a piece of software that designers use to create anything from a business card to a newspaper, magazine, graphic novel or book. It is a powerful program that handles multiple pages, masses of text and image placement with high end design capabilities.

InDesign is part of Adobe Creative Suite, and as such uses an interface that appears similar to Photoshop and Illustrator. One other leading industry DTP application is called Quarkxpress, although it is losing its foothold, because it is so expensive compared to InDesign, and becoming slightly outdated in function.

New Document

When selecting a new document, tailored page sizes can be created to suit the size of product - be it a broadsheet newspaper, or an oddly shaped picture book. Other information can be entered regarding how many pages are required, and how many column guides for text is desired, margin guides and facing page options for double page spreads. The information in the dialogue box below are measurements that relate to the dimensions and guides of the Guardian newspaper's G2 supplement.

How Many Pages?



Check the **Facing Pages** option if double page spread layouts are desired.

Number of pages can be entered here. Additional pages can be added in the **Layout > Pages** drop menu when your document is open

Numbers of text columns guides can be selected, The default gutter (space between columns) is set to 4.233mm

Margin guides can be set to create a typographic grid for helping with a maintaining design standard across pages.

Toolbar



A Selection tools

- Selection (V, Escape)*
- Direct Selection (A)
- Page (Shift + P)
- Gap (U)

B Drawing and Type tools

- T Type (T)
- Type On a Path (Shift+T)
- Line (L)
- Pen (P)
- Add Anchor Point (=)
- Delete Anchor Point (-)
- Convert Direction Point (Shift+C)
- Pencil (N)
- Smooth
- Erase
- Rectangle Frame (F)
- Ellipse Frame
- Polygon Frame
- Rectangle (M)
- Ellipse (L)
- Polygon

C Transformation tools

- Scissors (C)
- Free Transform (E)
- Rotate (R)
- Scale (S)
- Shear (O)
- Gradient Swatch (G)
- Gradient Feather (Shift+G)

D Modification and Navigation tools

- Note
- Eyedropper (I)
- Measure (K)
- Hand (H)
- Zoom (Z)

Viewing Pages

Pages can be viewed by double-clicking on the page icons in the **Pages** palette. The document can also be navigated by holding down the space bar and dragging the screen with the mouse (Except when a **Text Tool** is active.)

Guides

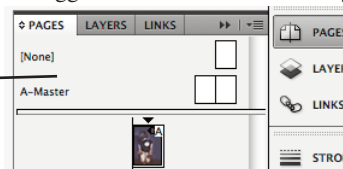
Guides can be turned on and off by selecting **View > Grids & Guides > Hide / Show Guides**. Shortcut is {Cmd ;}

Rulers

Rulers to the top and left of the document can be switched on and off in **View > Show Rulers**. Shortcut is {Cmd R}. Extra rule guides can be dragged out onto the document by clicking and dragging out from inside the rulers.

Master Pages

The **Master Pages** in the **Pages** palette can be used to position regular objects and texts that feature on all pages such as page numbers, and headers etc. See Page 5 for page numbering.



Importing Images

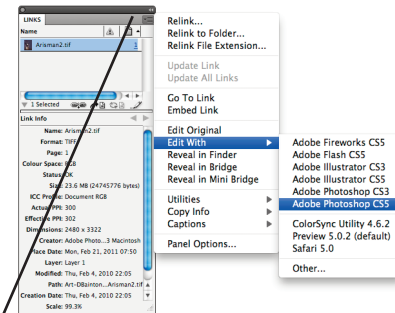
Picture can be imported into the document a number of ways. The simplest is by selecting **File > Place** from the drop menu. Once you have located the file which you wish to import, an icon (**The Place Cursor**) will appear which gives you option of either clicking once to bring the image in at its original size, or by clicking and dragging out a scaled size box in which to bring the image in a desired scale. The Place Cursor can also be used to place an image inside a pre-drawn frame. This can be done either by selecting a frame before **File > Place**, or moving the Place Cursor over a pre-drawn frame in the document.

File Types / Sizes

JPegs, Tiffs, EPS, PDF files can all be imported into InDesign, as well as native, multi-layered PSD and AI files. Keep an eye on unnecessary file sizes. The more layers in a document, the larger it becomes.

Linked Files

When images are placed into documents in InDesign, they aren't actually embedded into the document, instead, a thumbnail preview of the image is presented, with a link to the image file on disk. This happens to any image placed, which keeps the size of the InDesign document at a minimum. The Links Panel provides information on linked files which can be very useful. Details such as the scale at which an image appears on the page, what colour mode (RGB or CMYK), what page of the document etc.



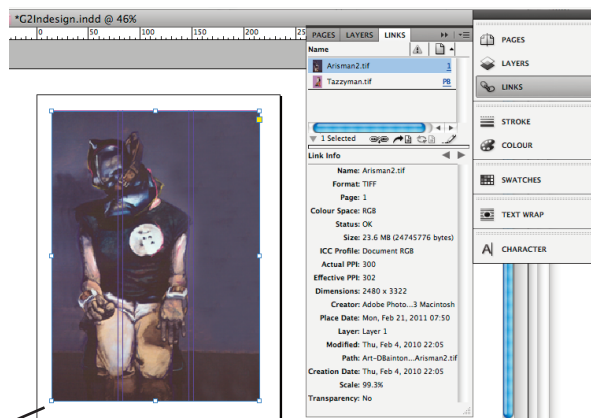
Editing Linked Files

Typically there are a few ways to edit linked files - the most useful way is through the **Link Palette**. The function **Edit Original** works, but sometimes doesn't open the file in the program you want. So instead, it is easier to nominate the program you wish to open from the list.

When you save any changes to your image, and return to InDesign, the file is automatically updated.

Turning Layer visibility on and off in PSD Files

To toggle layer visibility of PSD or AI files on and off, in InDesign, Select **Object > Object Layer Options** from the drop menu.

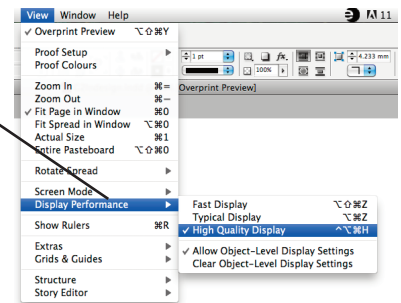


Re-Sizing Frames

Frames can be resized by dragging on the bounding box. Dragging on the corner points allows the width and height to be altered together. Holding down the {Shift} key will resize the bounding box to scale. Holding down the {Cmd} key will res-size the contents of the frame.

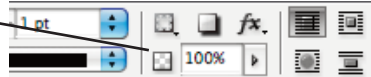
Viewing High-Res Previews Instead of Low-Res Thumbnails

Selecting **High Quality Display** will preview images in their true quality. This function can slow the application, and might be used occasionally.



Transparency

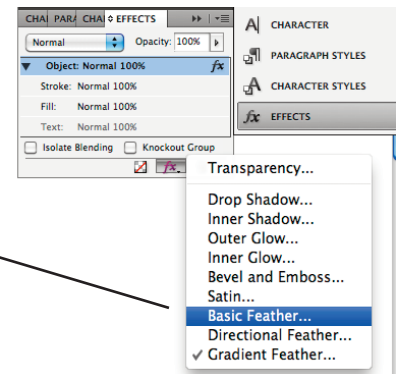
The opacity of a coloured object or an image can be altered using the Checkerboard Symbol in the Control Bar (making sure of course, that the image or object is active).



Effects

Drop Shadow / Feather

Whilst the Transparency can be changed in the Control Bar, transparency and much more can be done in the **Effects Palette**. The stroke, object and image can be isolated for transparency in this palette. The range of Blending options that features in Photoshop is found here, as are effects (fx) such as Drop Shadow. Additionally Feathering can be used to blur the edges of an image or an object, using either of the Basic, Directional and Gradient Options.



Moving Frames

Frames can be moved when the **Selection Tool** (Black Arrow) is active. If there is an image inside the frame, click and drag anywhere inside the frame except the centre circle. Dragging on the centre circle will reposition the image within the frame.

Selecting and De-Selecting

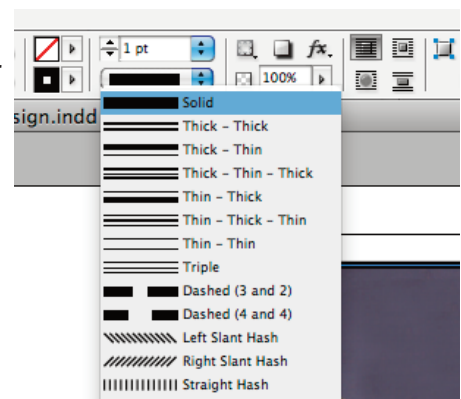
Objects can be selected and deselected by mouse-clicking on them to select, and clicking on a clear area of the document to de-select.

Moving Images Inside Frame

Images can be repositioned and resized within frames when the Selection Tool is active. As the black arrow cursor is moved over a picture frame, a circle will appear at its centre. The cursor changes to a hand tool when it is moved over the circle. Click and drag on the circle to move the image. If the mouse is clicked once, a bounding box will appear at the pictures edge, allowing the picture to be re-sized inside the frame.

Creating a border

Borders around frames can be created in the Control Bar at the top of the screen. Thickness, colour and line style can be determined.



Selecting Multiple Objects

Multiple objects can be selected by holding down the shift key to select additional objects. Alternatively, drag a selection area around multiple objects to select them.

Selecting and Creating Colour Swatches

New documents in InDesign come with default colours. If a new document **For Print** is selected in the New Document dialogue box, the colours mode will be CMYK. To add new colours swatches, select **New Colours Swatch** in the menu icon in the top right of the swatches panel.

How to Choose

Pantone Colours

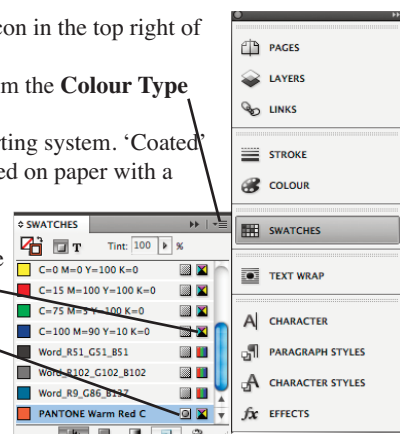
You can choose how colours are picked from the **Colour Type** drop menu. Pantone colours are a universal colour charting system. 'Coated' means colours that will eventually be printed on paper with a coating - like a magazine cover.

Process Colours

Process colours are colours that can be made up from a mixture of CMYK, and are indicated with this symbol

Spot Colours

Spot colours are separate single pre-mixed inks that are normally used in limited colour printing i.e., 1 or 2 colours (Process is 4)



Creating Standard Text

Text Attributes

For editing :
Typefaces
Type size
Style
Leading
Tracking
Colour

Paragraph Attributes

For editing:
Justification
Hyphenation
Drop Caps

Importing Text

Threading Text Frames

Import Text to automatically Create threaded text frames

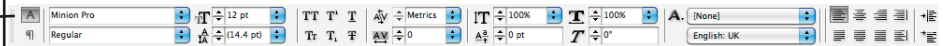
Text Frame Options

Vertical Alignment

Balancing Columns

Text Wrap

With the exception to Text on a path, all text must be contained within a text frame. Use the **Type Tool** in the tool bar to do this.



All of the actions can be controlled from the Control Bar at the top, making sure you have the Type Tool selected, and you have text frames active / text highlighted.

(Spacing between lines)
(Spacing between letters)



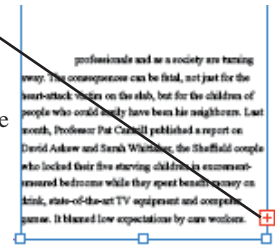
(Turning the breaking of words at the end of a line ON or OFF)

Text can be imported either into text frames, or into the **Place Holder**, ready to draw out a frame to place the text. RTF file types are ideal text files. Select **File > Place**

If there is too much text for the frame, the **Outport** icon will appear red.

Text can flow from one text frame to another by clicking from the **Outport** icon at the bottom right corner of a text frame, to the **Import** icon at the top left corner of the next text frame

Selecting **File > Place** and then **Shift-Clicking** the mouse in an area of the page where there is a typographic grid will indicate you wish to import all the text into as many new frames as necessary to contain all the text.



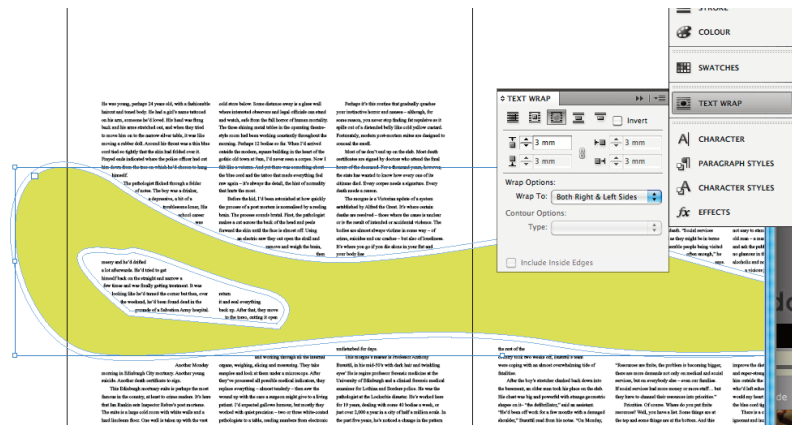
This dialogue box, found in the **Object** drop menu, allows for text to be formatted within the text frame. It allows for text to be inset in text frames, rather than coming to the edge.

Also vertical alignment can be modified here, so for instance, text can be centred vertically in a text frame.

Balancing columns is a useful feature that will balance the lines of text in a series of threaded text frames so that there shouldn't be a gap at the end of the text in the last column.

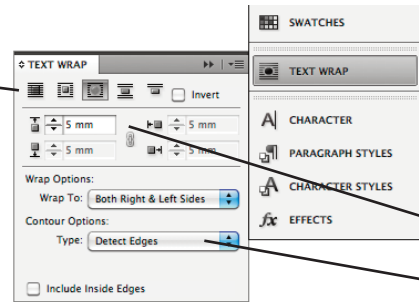
When the **Selection Tool** is active, and an Image or Object is selected, the **Text Wrap** function can be found in the **Control Bar**. It also has a separate palette which can be found in the **Windows** drop menu.

Text Wrap can be applied to Image Frames or Shape Frames. When active the affected frame or object displaces the text around it.



Text Wrap

There are five text wrap options to choose. The first icon is No Text Wrap. The second is a Text Wrap around the bounding box or frame of the image. The third is a wrap around the object shape. The fourth will return text below, rather than around, whilst the fifth will return text to the next column.



Text Wrap Around Object

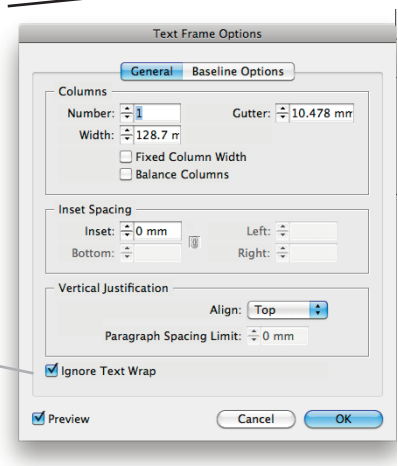
The third text wrap option can be the most useful, which, when selected should displace text around the shape of the image inside the image frame.

Text Wrap of shapes inside white boxes, and vector files

Files with white boxes around them and vector images such as Adobe Illustrator images behave differently with the text wrap function. For these, Select **Detect Edges** from the **Contour Options Type** drop menu

Determining the Gap between Image and text

The distance the type is displaced from the image can be determined here



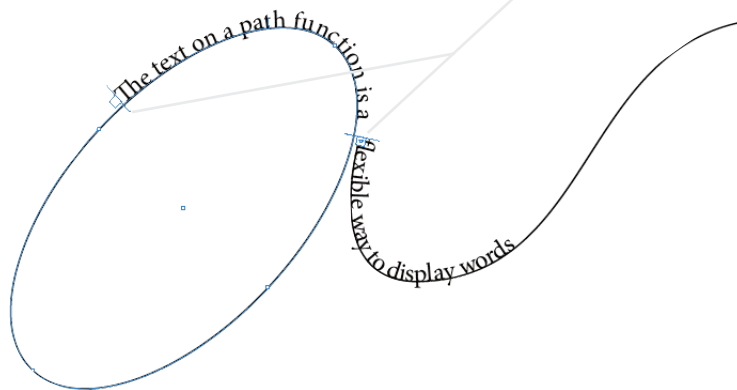
Cancelling Out Text Wrap

There may be certain text frames you do not want objects and images to displace, for example, Headers and large graphics. To do this, make sure the text frame you want to ignore the text wrap is active, and select **Object > Text Frame Options** from the top drop menus. Then check the **Ignore Text Wrap** tickbox.

Text on a Path

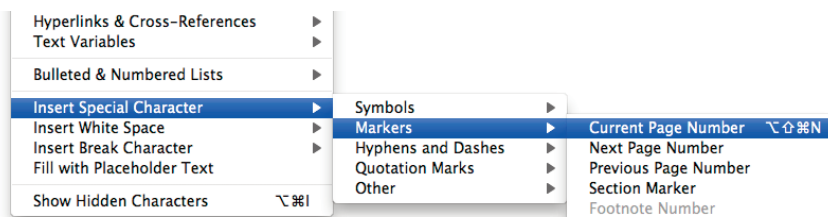
Text on a path is a quirky feature. First draw out a path with one of the Shape Tools or the Pen Tool. With the path active, select the **Text on a Path Tool** from the **Text Tool** drop out menu in the **Tool Bar**.

Then position the cursor on the path to start typing. The text can be moved on the path by using the **Selection Tool** and dragging on the Inport and Outport markers.



Page Numbers

Automatic page numbering can be created by selecting the **Master Pages** in the **Pages Palette**. Draw out a text frame where number is required. Then select **Type > Insert Special Character > Markers > Current Page Number**



Don't forget to make the text frame large enough for bigger numbers. If you have facing pages, you will have to duplicate the text frame on the facing page of the Master Page. When this is done, return to your normal pages by clicking on them in the **Pages Palette**.